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THE
FOOD
MARKETING
INDUSTRY
SPEAKS

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The Food Marketing Institute (FMI) is a non-profit association that conducts programs in research, education and public affairs on behalf of its 1,600 members — food retailers and wholesalers and their customers. FMI's domestic member companies operate more than 17,000 retail food stores with a combined annual sales volume of \$180 billion — half of all grocery sales in the United States. More than three fourths of the FMI membership is composed of independent supermarket operators or small regional firms. Its international membership includes more than 185 members from 47 nations.

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INTRODUCTION AND KEY FACTS

The supermarket industry in the 1980s is marked by global competitiveness and by mergers and acquisitions. European firms are buying and selling American supermarket companies. Many European retailers exist in markets limited by geographic, economic, cultural and often regulatory barriers. The U.S. market offers them potential to expand. At the same time, American firms are becoming involved in the Japanese food distribution industry. Both Europeans and Asians look to American technology to improve their operations.

Mergers, acquisitions and leveraged buyouts involving food distributors have become commonplace. As many as 31 retail supermarket companies were involved in takeovers in 1987, down slightly from 37 in 1986 but still considerably more than the 18 in 1985. These activities are changing the face of the retail supermarket industry as many prominent public companies become privately held. Some companies have streamlined their operations to prepare for possible takeover battles. Wholesale grocers also experienced buyouts and takeovers: 33 in 1987, slightly less than in the past three years.

Retail Sales Gain Over Previous Year	5.5%
Wholesale Sales Gain Over Previous Year	4.6%
Weekly Sales per Square Foot	\$8.80
Sales per Customer Transaction	\$16.30
Sales per Labor Hour	\$101.00
Gross Margin With Warehouse	23.9%
Gross Margin Without Warehouse	22.6%
Weekly Store Sales	\$184.210
Net Profit Before Taxes	1.6%

EXECUTIVE SUMMARY

In 1987, food distribution was a consumer-driven industry, meeting the increased demand for nutrition, convenience and economy. The industry continued to support the U.S. economic expansion, now the longest since World War II. In 1986 the amount of disposable income consumers spent on food at home fell below 10 percent for the first time in history. The 1987 number of 9.6 percent continued this trend. The industry reached this milestone through competition, technology and increased operating efficiency throughout the food system.

In 1987, supermarket current dollar sales grew at the same pace as in 1986, meaning that in real terms sales only grew 1.2 percent. Identical store sales—only those stores open in both 1986 and 1987—saw a very slight decline of three-tenths of a percent in real or inflation-adjusted dollars.

Food production followed consumer desires with increases in poultry and pork output and decreases in beef. Leaner animals and less fat on retail cuts were two examples of industry response to modern lifestyles.

As competition increased and consumers looked for more and better service, the industry responded by remodeling almost 10 percent of its stores. Also, for the first time in five years, more stores were opened than closed.

Special topics examined in this year's study include store-level training, the buyer's function and energy management. The latest advances in technology are playing important roles in all these areas. Proper personnel training to increase efficiency is one way to combat the growing labor shortage and prepare workers to meet the consumer demands for courteous, helpful service. Videos are one example of the latest techniques used in training. Technological advances are also aiding the industry buyer's decision making, and 90 percent of stores surveyed are saving energy through heat reclaim systems.

Much of the data in this report are compiled through FMI's annual study of the industry. Survey questionnaires were sent to FMI member and select non-member companies. FMI gratefully acknowledges all the companies who contributed their time and effort to complete the questionnaires.

The report examines wholesale distribution center operations, retail operations and productivity, and selected special topics—store-level personnel training, the buyer's function and energy management.

Industry information is also drawn from other FMI research such as *Operations Review* and *Facts About Store Development*. The institute would also like to acknowledge data gathered from the U.S. Departments of Agriculture and Commerce and from other government agencies and publications. A detailed explanation of the study's methodology appears in the appendix.

This report contains a complete analysis for 1987, but it does not include all the data from which it was developed. This information is provided in the companion report, *Detailed Tabulations from the Food Marketing Industry Speaks, 1988*. Another study, *Trends—Consumer Attitudes and the Supermarket, 1988 Update*, explores consumer shopping patterns and attitudes toward the many issues relating to supermarkets.

THE ECONOMIC CLIMATE

The year 1987 was filled with news for the U. S. economy:

- the slowdown in the growth of the federal deficit and the trade deficit.
- the stock market experienced a jolt of historic proportion.
- the expansion which began in 1982 continued unabated becoming the longest peacetime recovery since World War II.
- the U.S. gross national product rose to \$4,486.2 billion in current dollars and \$3,819.6 billion in real or 1982 dollars, a 3.8 percent increase in real terms from the fourth quarter of 1986 to the fourth quarter of 1987.

Some of these events affected the food distribution industry directly, while others made their presence felt in subtler ways. The amount spent on food in 1987 declined 2.2 percent from 1986. Food is included in personal consumption expenditures which slowed almost to a standstill, rising just 0.6 percent, after four years of increases exceeding 4 percent. This resulted in part from the dampening in the growth of personal income. Owing to the faster rise in consumer prices in 1987, the growth of real (inflation adjusted) disposable personal income rose 2.0 percent.

The percent of disposable income spent on food has declined over the past ten years from 16.1 percent in 1977 to 14.3 percent in 1987. The food-away-from-home component has remained steady at about 4.6 percent, while the decline is found in the most important category for the supermarket industry: food-at-home, which in 1986 fell below the 10 percent mark for the first time in history and dropped to 9.6 percent in 1987, after beginning the century at about 40 percent. The measure reflects the increased efficiency of retailers through technology and productivity enabling them to offer a customer better food values. It also presents a marketing challenge as customers continue to patronize food establishments away from home at the expense of retailers.

Perhaps the single most outstanding event of the year occurred on October 19, the so-called "Black Monday," when the Dow Jones Industrial Average dropped an astounding 508 points, or 22.6 percent, almost double the 12.8 percent crash in 1929.

Virtually every other measure of market health, such as Standard & Poor's 500 Index showed similar drops. Although supermarket stocks suffered, they fared better than the general market. On October 19, the Dow fell 36.1 percent and Standard & Poor's 500 listing fell 35.2 percent from their historic highs of August 25, 1987. By comparison, supermarket issues fell 29.1 percent for the period.

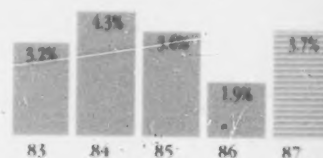
Foreign Direct Investment in United States Companies

1983	\$137.1 billion
1984	\$164.6 billion
1985	\$184.6 billion
1986	\$209.3 billion
1987	\$249.9 billion*

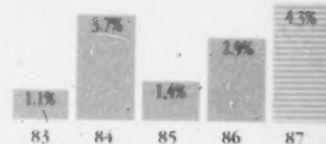
*estimated

Source: U.S. Department of Commerce

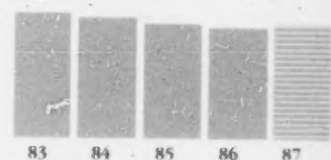
Consumer Price Index All Items



Consumer Price Index Food at Home



Consumer Price Index Food Away From Home

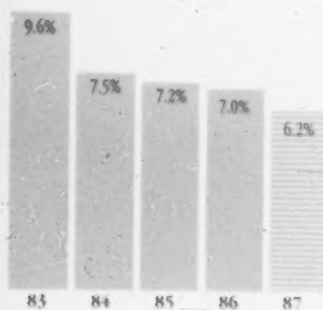


Gross National Product— Personal Consumption Expenditures



The trade deficit is an issue that affects food distribution through the steady rise of foreign investment in U.S. businesses and real estate. Unprecedented U.S. trade deficits have left foreign investors with a wealth of American dollars and limited interest in American goods. Direct foreign investment in U.S. companies rose 82 percent from \$137.1 billion in 1983 to an estimated \$249.9 billion in 1987, according to the U.S. Department of Commerce.

Civilian Unemployment

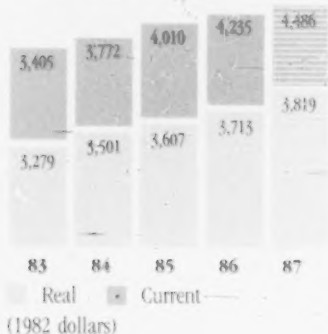


The decline in the value of the dollar contributed in large part to the 3.7 percent rise in consumer prices in 1987, the fastest pace in six years, according to the U.S. Department of Labor. The CPI Food at Home Index stood at 318.5 at year-end with a 4.5 percent rise in prices over 1986.

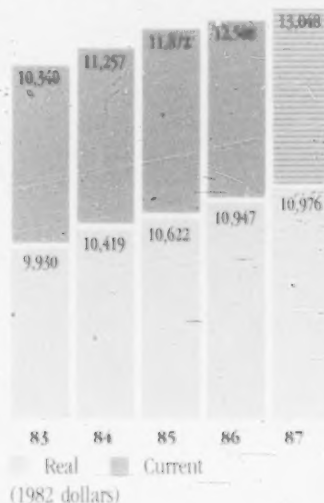
Strong employment growth has been a notable feature of the current expansion. The civilian unemployment rate declined from 6.7 percent in January 1987 to 5.7 percent in December, the lowest level since July 1979 and near the lowest since 1974. The unemployment rate for the year overall was 6.2 percent. For the food industry, as for other labor intensive industries, filling jobs was difficult.

The government also reported that the unemployment rate for youths, a traditional source of workers for the food industry, has dropped dramatically. The rate for those aged 16-19 years was 16.1 percent in December 1987, its lowest level in eight years and a drop of 8.0 percentage points from November 1982.

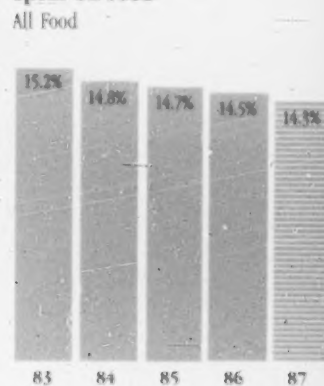
Gross National Product (Billions)



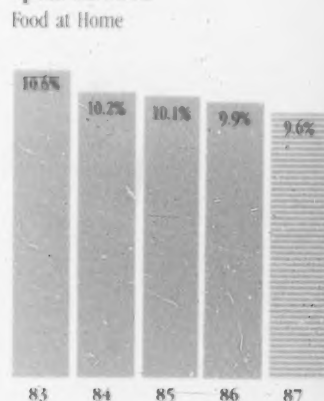
Per Capita Disposable Income



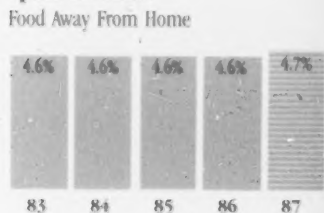
Percent Of Disposable Income Spent On Food



Percent Of Disposable Income Spent On Food



Percent Of Disposable Income Spent On Food



FOOD PRODUCTION

There were indications that the "farm crisis" of the past few years was beginning to abate in 1987. According to the U.S. Department of Agriculture (USDA), agricultural revenues in 1987 signaled a turnaround from six years of farm recession. Although bankruptcies among debt-ridden farmers continued to mount, USDA estimates indicate that net farm income for 1987 set a record of \$40 billion, more than twice the profits at the bottom of the farm slump.

Consumer demand continues to change the products found in our supermarkets. In FMI's annual *Trends—Consumer Attitudes and the Supermarket*, the most frequently mentioned nutritional concern was fat, followed by salt and sodium, and cholesterol levels. These consumer concerns are reflected in the production levels and product features in the meat, poultry and egg industry in particular. Producers have recognized these trends by breeding leaner animals and trimming the fat from retail cuts. This is bringing red meat more in line with modern lifestyles.

Total red meat production in 1987 was 38,681 million pounds, down from 39,050 million pounds in 1986 and 39,131 million pounds in 1985. The USDA reported that hog production increased, while total beef production declined about 2 percent from 24,371 million pounds in 1986 to 23,566 million pounds in 1987. It also reported a 25 percent decrease in the number of cattle on the nation's farms and ranches, from 132 million in 1975 to 99 million at the beginning of 1988.

Poultry products experienced another record year due in part to consumer perceptions of poultry being a healthy food. Consumption is up 17 percent since 1973, to 78.2 pounds per person in 1987.

The upswing in turkey consumption deserves particular note: the average American consumed the equivalent of a 15.6-pound turkey in 1987, up from 13.4 pounds in 1986 and 10.7 pounds in 1985. Turkey production was relatively stable from 1981-85, at about 171 million birds per year. This jumped to about 240 million turkeys in 1987. One reason for the increase was the collapse in turkey prices, falling from 93 cents per pound in 1985 to 51 cents per pound in late 1987.

It was a confusing year for dairy producers. Health-conscious Americans intent on reducing their cholesterol levels are eating fewer eggs, thereby driving prices down. Egg production has averaged 5.15 billion dozen since 1980.

Milk production in 1987 was about 1 percent less than 1986's 144.1 billion pounds, according to the USDA. Production declines were caused by government programs that paid producers to curb output. Milk per cow posted strong gains in 1987, with productivity up almost 3 percent. One complication in milk production was caused by the government's program of whole herd buyouts, known as the Dairy Termination Program (DTP). Under this program, entire dairy herds were bought out and their owners agreed to stay out of the business for a specified time period. Thus, milk per cow numbers declined every month from January 1986 to May 1987. Once the DTP program ended, the numbers leveled off.

Production of the 10 major fresh vegetables (asparagus, broccoli, carrots, cauliflower, celery, sweet corn, lettuce, onions, tomatoes and honeydews) for 1987 remained close to the 215.3 hundredweight of 1986. Corn production in 1987-88 was estimated at 7,064.1 million bushels by the USDA, down about 13 percent from 1986-87. The large drop resulted from the effects of government programs aimed at reducing acreage. The yield per acre was a record 120.3 bushels.

One recent trend in the supermarket industry has been the emergence of stores featuring exotic produce and other gourmet items. The USDA reported that shipments by U.S. growers of specialty vegetables (Oriental, Mexican, tropical and other unusual vegetables) were up 13 percent in 1987.

III

WHOLESALE AND DISTRIBUTION CENTER OPERATIONS

WHOLESALE

Wholesalers are the link in the food distribution chain that moves products from the manufacturer to the independent retailer. They also provide essential services to these same retailers. Sales in the wholesale companies surveyed in 1987 grew 4.6 percent in current dollars, or 0.3 percent in real dollars, compared with 5.0 and 2.0 percent respectively in 1986.

In 1987, all of the wholesalers surveyed provided their members with individual item pricing and product-movement data. Over 97 percent provided advertising programs and equipment procurement and handled private label products. In many cases, wholesalers provide personnel training for their retail customers. This topic is examined in the Personnel Training section of this report beginning on p. 14.

Services Provided to Membership

Individual Retail Pricing	100.0%
Product Movement Data	100.0
Advertising Program	97.3
Equipment Procurement	97.3
Handle Private Label	97.3
Handle Generic Label	94.6
Scanning Support	91.9
Real Estate & Store Engineering	89.2
Gross Margin Report by Item	89.2
Interior Decor & Design	83.8
Retail Accounting	81.1
Discount Programs	81.1
Member Payroll	78.4
Equipment & Fixture Financing	78.4
Education/Training	73.0
Space Allocation	73.0
DSD System	73.0
Lease Financing	62.2

DRY GROCERY DISTRIBUTION CENTERS

In 1987, a typical dry grocery distribution center measured 250,000 square feet and employed 108 people. Smaller centers were staffed by 24 people and larger ones by 249 people. A typical dry grocery center:

- shipped 196,000 cases per week to 81 supermarkets in 207 truckloads with wholesale centers processing 517 orders per week and retail centers processing 238 orders.
- received 199 inbound truckloads per week.
- carried 6,400 items and turned its inventory over 16 times annually with a scratch rate of 3.0 percent.

Employees typically received 390 cases per direct labor hour, stored and replenished 18 pallets per direct labor hour, selected 169 cases and shipped 156 cases per direct labor hour.

Dry Grocery Distribution Centers

Typical Area	250,000 sq. ft.
Typical Number of Cases Shipped per Week	196,000
Typical Number of Supermarkets Served	81
Typical Number of Items Available	6,400
Typical Number of Inventory Turns	16X
Typical Number of Inbound Truckloads per Week	199
Typical Number of Outbound Vehicle Loads per Week	207

Frozen Distribution Centers

Typical Area	37,600 sq. ft.
Typical Number of Cases Shipped per Week	45,065
Typical Number of Supermarkets Served	86
Typical Number of Items Available	1,000
Typical Number of Inventory Turns	18X
Typical Number of Inbound Truckloads per Week	40
Typical Number of Outbound Vehicle Loads per Week	60

DRY-GROCERY SHIPPING CONTAINERS

Independent research has determined that damage to dry grocery shipping containers in the warehouse and retail store is costing the industry \$2.5 billion a year. A joint industry committee has issued voluntary shipping container guidelines intended to make the system more efficient, enhance worker safety and achieve significant reduction in damage as products move through the system. Specific issues include standardization of case markings, reduction in the number of case sizes, uniform pallet patterns and footprint sizes and maximum case weights. Industry leaders believe that the vast majority of national-brand and private-label suppliers can adjust their packaging to conform to these guidelines within three to five years.

FROZEN DISTRIBUTION CENTERS

The typical frozen distribution center:

- measured 37,600 feet.
- employed 18 people.
- had 40 inbound truckloads arrive per week with the employees receiving 488 cases per direct labor hour.
- centers shipped 136 cases per direct labor hour or 45,065 cases per week.
- processed 271 orders serving 86 stores.
- had inventory turn over 18 times annually with a scratch rate of 2.0 percent.

Typical Number of Employees in a Dry Grocery Distribution Center

Total Centers	—108
Size of Center (sq. ft.)	
Less than 100,000	24
100,000 - 199,999	67
200,000 - 299,999	109
300,000 - 399,999	146
400,000 or more	249

FLEET INFORMATION

The majority of food products are transported from the wholesaler and/or distribution center to the retail store by tractor-trailers. A typical company used a fleet of 233 trailers almost evenly divided between refrigerated and dry. About nine-tenths of the 95 tractors operated by a typical company had three axles and the remainder two axles. The majority of the fleet was owned by the operating company with 93 percent of truck fleet miles driven on owned equipment. The composition of the tractor-trailer fleet has not changed appreciably since 1985, the last time FMI examined this facet of the industry.

A typical truck fleet drove a total of 6.56 million miles in 1987. The fleet consumed 1.2 million gallons of fuel and averaged 5.48 miles per gallon. Fuel typically cost \$1.06 per gallon.

In the personnel area, companies employed 131.5 full-time drivers and 9.1 part-time drivers in a typical week, the majority of whom were employed by the company itself.

DISTRIBUTION CENTER PERSONNEL

This year, a special study was done on the personnel who staff distribution centers. Some highlights are:

- about 85 percent of the workforce were full-timers.
- the vast majority were men: 99 percent of supervisory workers and 96.5 percent of line workers were male.
- only 2.5 percent were salaried, most were paid hourly.
- the annual employee turnover rate was 4.4 percent.
- Almost 60 percent of centers surveyed were completely unionized, 26.1 percent were not unionized, and 14.1 percent were staffed by both union and non-union people.

The study specifically examined supervisors in distribution centers. In almost all centers (93.3 percent), supervisors were salaried and in 76.6 percent of the centers they were not paid overtime. Just over 87 percent of the centers surveyed had a policy of promoting line workers to supervisory positions. Almost two-thirds of workers promoted had been employed at the center for five years or more. Just about 18 percent of supervisors were college graduates, while the remainder had high school diplomas.

Typical Number of Employees in Various Positions

	Management	Clerical	Supervisory	Line
<i>All Centers</i>	5	14	15	179
Sq. Ft. (in thousands)				
Less than 100	4	3	3	41
101-350	3	9	7	106
351-550	4	14	16	221
551-750	8	26	28	452
751-999	6	21	35	451
Over 1 million	20	57	59	1,328

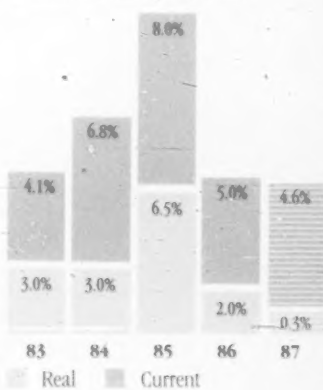
Engineered labor standards have been implemented in 55.3 percent of the centers surveyed. Almost half have had the standards for four years or less, just over 40 percent had them in place between five and ten years, and only 9.6 percent had them for 11 years or more. The standards were developed in partnership with outside consultants in 76.9 percent of the centers. Employee and supervisor input was used in 48.1 percent and computer software in 21.2 percent. The union was involved in implementing the standards in only 18.0 percent of the centers, while the standards were included in the union contract in only one quarter of cases.

Computers were used to measure employee performance against the standards in the majority of centers. A typical disciplinary process began with a verbal warning in the first instance, written warnings for the second instance, followed by suspensions for a third instance.

Typical Uses of Engineered Labor Standards

Plan Shifts	63.5%
Track Individuals Productivity	100.0%
Track Area Productivity	75.0%
Track Shift Productivity	84.6%

Wholesale Sales Increase



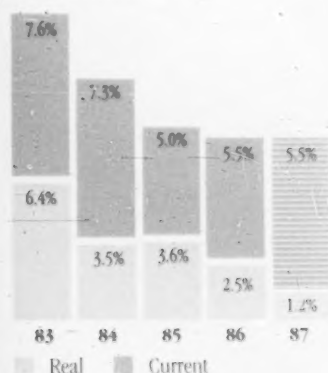
IV RETAIL OPERATIONS

STORE DEVELOPMENT

Remodelings were the most frequent activity in store development in 1987. A typical major remodeling, that of \$50,000 or more, required a capital investment of \$500,000 or \$24.24 per square foot. As in 1986 and 1985, almost 10 percent of all stores underwent a major remodeling, contrasted with only 6 percent from 1981 to 1984. The number of remodels is increasing because good sites are harder to find and more expensive. Plus, it is imperative for operators to upgrade existing stores to meet intensive competition and increased consumer demand for more and better service and a friendly, comfortable atmosphere.

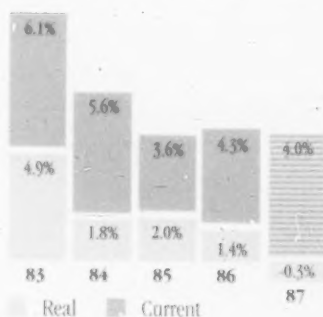
For example, to meet the demand for one-stop shopping, store owners are adding more departments: 54 percent of stores in 1977 had a scratch or bake-off bakery; in 1987 that figure rose to 65 percent. In 1977, only 25 percent featured fresh seafood compared with 42 percent in 1987.

Retail Sales Increase

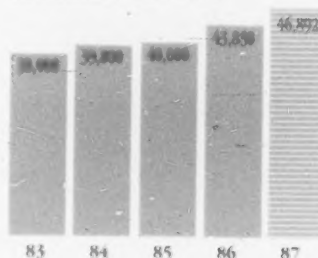


In 1987, for the first time in five years, more new stores were opened than closed, 4.6 percent to 3.3 percent. The percentage of newly constructed stores has remained the same (between four and five percent) for the past 10 years. Over this same time period, store closings fluctuated from a high of almost 7 percent in 1984 to 1987's low of 3.3 percent. The 10-year average of 4.8 percent was only slightly more than openings. Super stores and combination stores dominated store construction in 1987 at 36.8 percent and 37.9 percent, respectively. New conventional stores accounted for 17.8 percent of new stores and warehouse stores only 5.1 percent. A typical new store measure 146,892 sq. ft. and cost \$75.66 per square foot to construct.

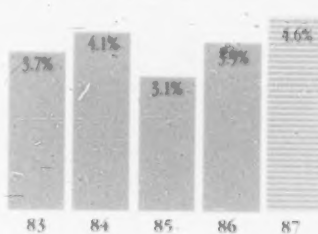
Identical Stores Sales Increase



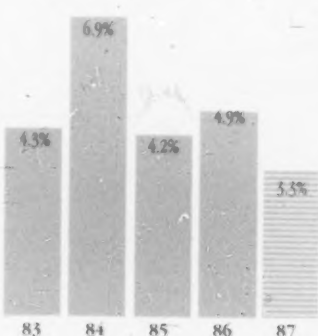
New Store Total Areas



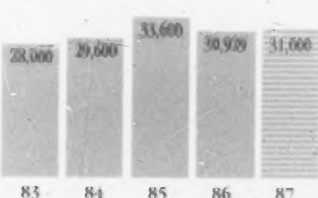
New Store Openings



Store Closings



Total Store Size (sq. ft.)



SALES, MARGINS, AND PRODUCTIVITY

Retail sales grew 5.5 percent in current dollars over 1986, equaling the growth of the previous year. In real terms (1982 dollars), sales grew 1.2 percent. For identical stores that were open in both years, sales grew 4 percent in current dollars, close to the 4.3 percent reported for 1986, translating into a slight decline of 0.3 percent in real or inflation-adjusted dollars. When related to the decline in disposable income spent on food at home each year (see p. 7), these data show that the industry is providing more and better services at a lower cost to the customer.

The typical gross margin as a percent of sales in 1987 was 23.90 percent for those firms with a warehouse and 22.61 percent for those without. These percentages have not changed appreciably over the past decade. A food retailer typically spent 8.64 percent of its sales on wages labor and 2.50 percent on fringe benefits for a total labor expenditure of 11.14 percent. The typical net pre-tax profit was 1.59 percent of annual sales.

Looking at productivity measures, a typical store generated \$184,210 in sales per week, up from \$171,936 in 1986. Companies with one to five stores brought in \$119,540 in weekly sales, while those with six or more stores generated \$187,017. For all stores, this worked out to be \$8.80 in sales per square foot per week, an 11 percent increase from 1986. Firms with one to five stores performed slightly better per square foot at \$8.88. A typical store generated \$101.00 in sales per labor hour in 1987, up 12 percent from 1986. Sales per labor hour totaled \$81.00 in smaller firms.

In 1987, a typical supermarket transaction rang up \$16.30. Sales per checkout declined slightly, from \$21,791 in 1986 to \$20,980 in 1987. This may be due to the fact that over 14 percent of stores were either remodeled or newly constructed, in most cases adding more checkouts.

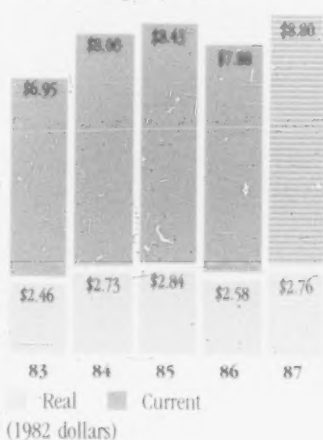
The price of an average item dropped from \$1.48 in 1986 to \$1.38 in 1987. As stores grow larger, customers enjoy a greater choice. A typical store in 1987 carried 24,531 items, up 24 percent from 1986 and almost double the 1982 count.

This year's *Speaks* study examined those firms in the top 25th percentile of growth in annual sales. Their sales grew 16.4 percent, substantially more than the overall industry rate of 5.5 percent. Their typical weekly sales per checkout totaled \$28,352, compared with the total industry's rate of \$20,980. They earned \$226,800 per store versus \$184,210 for the industry. The most successful of the smaller firms (those operating one to five stores) brought in \$130,000 per week per store, compared with \$119,540 for small firms overall. This translated into \$23,651 per checkout versus \$18,571 overall.

Successful companies also registered better productivity measures, such as higher sales per square foot. The industry typically earned \$8.80 per square foot, while the more profitable companies earned \$13.35 per square foot. Sales per labor hour for the top growth firms were \$95.42, compared with the overall industry figure of \$101.00. It is likely that the more profitable operations meet the consumer's demand for more and better service, thus the lower sales per labor hour.

Among the firms with one to five stores, it was found that those in the top 25th percentile of annual growth generated \$17.56 per square foot, double the overall median of \$8.80. Unlike the larger companies, their sales per labor hour exceeded the industry figure of \$101.00. These companies tend to have smaller stores than the larger chains, with less room for expanded service departments. Instead of adding labor, they are probably making more efficient use of their current employees to better serve their customers.

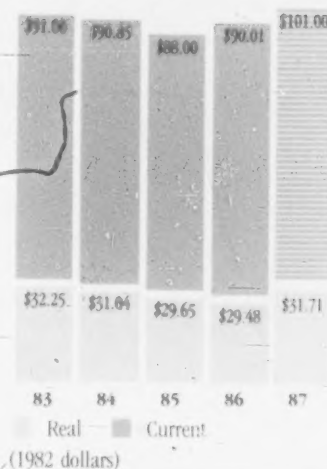
Sales Per Square Foot



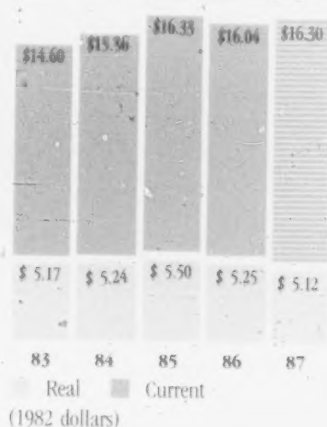
Trends in Operating Results

	1983	1984	1985	1986	1987
Profit					
Gross Profit With Warehouse	23.7%	24.1%	24.0%	23.6%	23.9%
Gross Profit Without Warehouse	21.5%	21.6%	22.3%	21.3%	22.6%
Net Profit (before taxes)	1.0%	1.6%	1.8%	1.7%	1.6%
Labor Expenses					
Store Labor	8.8%	8.9%	8.6%	8.8%	8.6%
Fringe Benefits	2.2%	2.3%	2.3%	2.2%	2.5%

Sales Per Labor Hour



Sale Per Customer Transaction



Number of Items

Combination	23,000
Super Store	18,000
Warehouse	16,755
Conventional	11,500

Sale per Customer Transaction

Warehouse	\$18.77
Combination	17.95
Super Store	17.17
Conventional	14.34

Sales per Labor Hour

Warehouse	\$146.90
Combination	98.52
Conventional	96.85
Super Store	96.08

Retail Price per Item

Combination	\$1.46
Warehouse	1.38
Super Store	1.37
Conventional	1.33

Weekly Sales per Square Foot of Selling Area

Super Store	\$9.06
Conventional	9.06
Combination	8.44
Warehouse	8.24

Weekly Sales per Store

Combination	\$341,828
Warehouse	251,073
Super Store	245,986
Conventional	131,427

Weekly Sales per Checkout

Super Store	\$29,657
Combination	29,204
Warehouse	21,607
Conventional	21,600

EMPLOYEES

STORE-LEVEL TRAINING

One of the most serious problems facing the industry today is the labor shortage at the retail level. The industry is in a double bind, because, in this age of fast-paced competition, customers are demanding more service departments.

Illustrating the labor shortage, last year's *Speaks* found that 51.7 percent of the companies surveyed were experiencing recruiting difficulties. Among the reasons given, 28 percent indicated a lack of experienced/qualified applicants and 22 percent were in full-employment or low-unemployment areas. Almost 10 percent of those companies cited a shortage of teenagers, the traditional source of supermarket employees. This problem is likely to continue since the Census Bureau forecasts that the percentage of people aged 14 to 24 will decline from 18.2 percent of the total population in 1985 to 14.5 percent by the year 1995. After 1995, the percentage is expected to rise slightly as the children of the "baby boomers" become teenagers.

One solution to the labor problem is making more efficient use of existing employees through technology and improved training. Therefore, this year's *Speaks* examined store-level training.

In the companies surveyed, new clerks and cashiers typically received 20 hours of training and new baggers eight hours. These numbers were similar for firms of all sizes. Experienced people typically received about half that amount. A typical new manager received 160 hours of training, with larger firms (500+ employees) providing 300 hours and smaller ones 40 hours. Experienced managers typically spent 55 hours in training.

Type of Training

	Clerks	Cashiers	Baggers	Managers	Pharmacists
Videos	70.8%	73.7%	66.5%	67.0%	4.8%
Seminars	25.4	31.6	14.8	82.8	8.6
On-the-Job	94.7	95.7	91.4	88.5	15.8
Certification Programs	6.2	12.4	3.8	16.3	5.7
Self-training/Home Study	14.4	12.4	7.7	33.5	3.3

Projections of the Percent Distribution of the Population Aged 14-24: 1985-2010

	14-17	18-24	Total
1985	6.2%	12.0%	18.2%
1990	5.2	10.3	15.5
1995	5.4	9.1	14.5
2000	5.7	9.2	14.9
2010	5.3	9.8	15.1

Source: U.S. Department of Commerce, Bureau of the Census

Proposed New Training Methods for 1988

Videos	59.8%
Seminars	33.5
On-the-Job Training	40.2
Train the Trainer	39.7
Home Study	31.6
Certification Programs	27.8

Training Topics Offered to Managers

Operations and Management	85.2%
Supervisory Skills	85.2%
Front end Management	82.3%
Labor Scheduling	80.9%
Loss Prevention	80.4%
Inventory Control	77.0%
Sanitation	77.0%
Receiving/Storage at Back Door	75.6%
Presentation of Product	72.7%
Safety	72.7%
Care of Product	71.3%
Other Merchandising	65.6%
Selling Skills	60.3%
Choice of Product	57.9%
Other	18.2%

Speaks found videos were a very popular training medium. There was a 20 to 30 percentage-point gap in video use between the largest and smallest firms. The smaller operators preferred a more personal touch with the same person training everyone, providing uniform information. In large firms the videos provided this consistency.

Training Topics Offered to Clerks

Care of Product	73.2%
Sanitation	72.7%
Safety	71.3%
Loss Prevention	66.5%
Presentation of Product	63.6%
Receiving/Storage at Back Door	61.7%
Selling Skills	58.4%
Other Merchandising	41.6%
Inventory Control	31.1%
Choice of Product	24.9%
Front End Management	19.1%
Operations and Management	14.8%
Other	13.9%

New cashiers were sent to seminars by over 31 percent of the firms surveyed. Smaller percentages did so for clerks and baggers. Managers spent much more time in seminars, with almost 83 percent of companies sending their new managers to educational programs.

On-the-job was the most popular type of training, used by over 90 percent of the responding companies for baggers, cashiers, clerks and managers. Certification programs were not nearly as popular.

Because the food distribution industry is labor intensive, a large portion of the training topics offered to managers were related to staff supervision.

Training topics offered to clerks tended to be product oriented. Safety was mentioned by over 71 percent of companies surveyed, an important finding in light of the new OSHA Hazard Communication Standard which goes into effect this year.

Companies generally employ three full-time people to conduct training along with four part-timers. Even smaller firms with fewer than 100 employees typically had two full-time employees conducting training.

Respondents were also asked about training methods proposed for 1988. Videos led the list, especially in smaller companies, another indication of their popularity. "Train the trainer" was mentioned by almost 40 percent of the firms surveyed. With the continued labor shortage, effective training of store-level employees will remain a priority.

WHOLESALE TRAINING

Among wholesalers, *Speaks* found that nearly all (91.3 percent) offered training to both their staff and their retail customers, while the remainder (8.7 percent) trained only their wholesale staff. Two-thirds scheduled regular educational programs at various intervals during the year.

Some wholesale companies (38.1 percent) have used an educational check-off system in which retail members are regularly billed for educational programs. For this service, all those companies billed their retail customers a fixed amount per week, month or year.

Popular training methods in wholesale companies included videos, seminars, on-the-job, certification programs and at-home study programs. For example, 100 percent sent managers to seminars, 76.2 percent prepared managers with videos, 47.6 percent trained managers on-the-job and 4.8 percent employed certification programs for managers. Topics frequently covered in the annual training cycle included store operations and management, supervisory skills and basic retail skills, which were all mentioned by 85.7 percent of the respondents. Also popular were selling (66.7 percent), presentation of product, front-end management, receiving and storage (61.9 percent) and care of product and inventory (52.4 percent). In addition to regularly scheduled seminars, 81 percent of the firms surveyed had management conferences for owner/operators and sent people to food shows.

Although wholesalers and distribution center operators do not face the labor shortage of retailers, training of wholesale personnel remains important. The education of wholesale staff varied by the position: 82.6 percent trained selectors on the job and 78.3 percent did so for loaders. Only 56.5 percent educated truck drivers on the job. While 8.7 percent sent truck drivers, selectors and loaders to seminars, by contrast, 73.9 percent educated their retail counselors in this manner. New topics to be offered to wholesale staff in 1988 include selling, performance evaluation, leadership and communications skills.

Three people typically worked in staff education on a full-time basis along with two people part-time. Staff training was done at a company facility by 56.5 percent of companies surveyed.

Topics Covered During the Annual Training Cycle

Store Operations and Management	85.7%
Basic Retail Skills	85.7
Supervisory Skills	85.7
Selling	66.7
Front End Management	61.9
Presentation of Product	61.9
Receiving/Storage	61.9
Care of Product	52.4
Inventory	52.4
Scheduling	47.6

Training Methods Used by Wholesalers

Type of Training	Clerks	Cashiers	Baggers	Managers	Pharmacists
Videos	71.4%	66.7%	61.9%	76.2%	4.8%
Seminars	52.4	47.6	33.3	100.0	4.8
On-the-Job	57.1	52.4	47.6	47.6	4.8
Certification Programs	9.5	14.3	—	4.8	4.8
Self-training/Home Study	28.6	28.6	28.6	47.6	—

Training Methods Offered to Wholesale Staff

Type of Training	Truck Drivers	Selectors	Loaders	Retail Counselors
Videos	47.8%	52.2%	43.5%	52.2%
Seminars	8.7	8.7	8.7	73.9
On-the-Job	56.5	82.6	78.3	65.2
Certification Programs	17.4	8.7	4.3	26.1
Train-the-Trainer	13.0	8.7	8.7	21.7

Schedule of Regular Educational Programs

Percent of Wholesalers	
Having Regular Programs	66.7%
Every two months	7.1
Quarterly	21.4
Varies	7.1
Five to ten times a year	14.3
Six to eight times a year	7.1
Weekly	7.1

THE BUYER'S FUNCTION

Because an important industry trend is the increasing number of new items introduced, this year's *Speaks* study looks at how decisions are made, the number of items reviewed and how buying is organized. A typical firm employed four full-time buyers, each responsible for 2,000 items. In almost 62 percent of the stores surveyed, buying was organized by product with the buyer responsible for many departments.

Buyers spent their time in many activities. Replenishing the warehouse, interviewing and merchandising were listed most frequently. Among firms using Direct Product Profit (DPP), only 15 percent of the time was spent in replenishing the warehouse, while in those companies not using DPP just over half the time was spent replenishing the warehouse.

In 1987, a company typically reviewed just over 2,700 new items, the majority (1,762) in the grocery department. GM/HiBA items and refrigerated items were next, approaching 600 new items reviewed. Almost 50 percent of the new grocery items actually made it onto the shelves, while 23 percent of the refrigerated/frozen and almost 13 percent of the GM/HiBA items did so.

Uses of a Typical Buyer's Time

Interviewing	14.2%
Pricing Products	7.6
Re-ordering	11.3
Buying New Items	9.0
Category Review	6.3
Replenishing Warehouse	16.3
Merchandising	13.3
Advertising	10.5
Other	11.4

Number of New Items Reviewed in 1987

Grocery	1,762.1
Produce	57.9
Refrigerated/Frozen	566.9
GM/HiBA	598.8
All Others	377.9
Store Total	2,701.5

Percentages of New Items Actually Stocked

Grocery	49.1%
Produce	5.8
Refrigerated/Frozen	23.2
GM/HiBA	12.7
All Others	9.2

Information Produced for Buyer's Use

Gross Margin	72.2%
Item Movement in the Store	65.4
Item Movement in the Warehouse	60.2
Dead Product Report	45.1
Service Levels of Warehouse to Stores	40.6
Dollar Contribution	36.8
Direct Product Profit	9.0

Ways Decisions Are Made on Whether to Stock New Items

Sales	82.0%
Vendor Information	82.0
Customer Suggestions	75.9
Store Personnel	45.1
Warehouse Turns	42.1
Trade Press	40.6
Firms That Track Product Movement	30.1
Market Research Studies Done for the Company	21.8

Over 53 percent of companies surveyed used a buying committee, almost 80 percent of which held weekly meetings. Membership in this group included: a buying executive in 83.1 percent of companies surveyed, merchandiser (74.6 percent), corporate executive (31.0 percent) and store managers (32.4 percent), as well as other positions. Almost three-quarters had a merchandiser, indicating that buying and merchandising are closely tied. About a third of the committees make decisions by consensus, while in another third, one person makes the decision. More small firms (one to five stores) have one person making the decision, while firms with 21-plus stores tend to have one or two people decide.

Many factors were used to make buying decisions: gross margin, item movement, sales and vendor information, store personnel comments, customer comments and trade press articles. Like other parts of the industry, buyers are using technology as they decide which new items to buy and which existing ones to keep on the shelves. For example, 38.3 percent of companies surveyed use scanning information for buying decisions.

VI

ENERGY

ENERGY MANAGEMENT

One of the most fascinating areas of the food distribution industry is the technology used to support daily operations. Faced with a severe labor shortage, the industry is turning to technology to improve efficiency and facilitate cost savings and enhance merchandising.

This year's *Speaks* study examined energy consumption in the supermarket, which is typically divided as follows:

Refrigeration	55 percent
Lighting	20 percent
Heating and Air Conditioning	15 percent
Miscellaneous	10 percent

The miscellaneous category covers energy used for trash compactors, floor-washing machines, buffers, fans, water coolers, bakery ovens, ice makers, meat-slicing equipment and cash registers. Energy costs average over 1 percent of total supermarket sales. Since the net pre-tax profit in 1987 was 1.59 percent, this number is significant.

Energy issues may not be the focus of media attention they were during the energy crises, but food distributors continue to seek ways to save energy costs. Relatively common in the last decade, heat reclaim systems were used by 90 percent of stores surveyed in 1987. Also, 70.3 percent of companies surveyed installed new heat reclamation systems tied in with their refrigeration compressors. These systems use the heat produced as a by-product of refrigeration to heat the store. A heat reclaim system can raise store temperatures to 50 degrees higher than the temperature outside. For many stores, therefore, the heat is free until the temperature drops below 15 degrees.

Methods Used to Control Heating Costs

Installed Heat Reclamation Systems Tied in with Refrigeration Compressors

New	70.3%
Retrofit	52.7%

Reduced Store Front or Other Windows

New	39.9%
Retrofit	75.0%

Lowered Temperature in Store at Certain Times of Day

New	29.7%
Retrofit	56.8%

Changed Heating Systems

New	11.5%
Retrofit	71.6%

Improved Efficiency of Boiler or Auxiliary Heat Source

New	7.4%
Retrofit	84.5%

Reduced Infiltration Losses

New	29.1%
Retrofit	62.8%

Methods Used to Increase Insulation

Added Insulation to Roof

New	44.6%
Retrofit	56.8%

Added Insulation Above the Ceiling

New	13.5%
Retrofit	73.6%

Added Insulation Into the Walls

New	35.1%
Retrofit	73.0%

Added Insulation Under Freezer Zones

New	23.6%
Retrofit	80.4%

In other attempts to reduce energy, almost 40 percent reduced the windows in store fronts and elsewhere in new store designs and three-quarters did so in remodels. Many companies added insulation to the roof, above the ceiling, in the walls and under freezers. Energy controllers installed as standard equipment in new stores included defrost timers, HVAC control, lighting control (time clocks) and refrigeration alarm systems. Electronic energy control systems saved a typical company \$20,000 per store, while incurring a cost of \$500 to operate. Early detection of energy problems by electronic sensors resulted in a savings of \$3,000 worth of product that would have been lost otherwise.

VII

APPENDIX

The *Speaks* report is a result of food marketing companies' participation in FMI's annual survey process. Each year companies are invited to complete surveys of retail operations, distribution center operations and other subjects. This report summarizes key findings of the surveys. Additionally, several special surveys are done each year. In 1987, these included the buyer's function, store-level personnel training and energy management. Both FMI member and nonmember companies were invited to submit data for the study. The sample descriptions for retail operations, distribution center operations, energy management, buyer's function and store-level personnel training appear below. These numbers represent information from approximately 20 percent of the companies invited to participate.

All data shown in this report are median figures except where noted. Medians provide a better industry benchmark, because, unlike averages, they are not subject to distortion by individual extremes. This is important when a few companies differ markedly from the market average.

FMI defines a supermarket as a retail food store with annual sales of at least \$2 million. When measuring real growth in sales or productivity FMI *Speaks* uses the CPI food-at-home index and its annual percentage increase as deflators. To deflate a dollar, the CPI food-at-home number is used. For example, to deflate the 1987 weekly sales per checkout (see p. 12), divide the current-dollar figure (\$20,980) by the 1987 CPI food-at-home number (318.5), then multiply the total by 100 ($20,980 / 318.5 \times 100 = \$6,580$ "weekly sales per checkout" in real or deflated dollars). On the other hand, to deflate a percentage, such as 1987 "retail sales increase" (p. 11), add one to the 1987 current dollar percentage ($1 + .055$), then multiply this by the inverse of the 1987 food-at-home percent change plus one ($1 / 1.043$). The answer is 1.012 or 1.2 percent. The attached table charts the CPI food-at-home index and the percentage increase in the index for the past five years.

Readers who have a need for more detailed facts and figures can find the supporting tables for this report in the companion publication the *Food Marketing Industry Speaks, 1988, Detailed Tabulations* and in *Facts About Store Development*. Readers interested in the financial side of the industry may refer to FMI's *Annual Financial Review*, while those specifically interested in the independent operator can obtain the *Operating Results of Independent Supermarkets*. FMI also produces *Trends—Consumer Attitudes and the Supermarket* which explores the shopper's view of the supermarket, shopping patterns, nutrition and other areas.

Index for Deflating FMI Data

	CPI Food at Home	% Increase
1983	282.2	3.4
1984	292.6	1.1
1985	296.8	3.7
1986	305.3	2.9
1987	318.5	4.3

Sample Description For Food Marketing Industry Speaks

Retail Operations Questionnaire		Buyer's Function Questionnaire		Distribution Center Personnel Questionnaire		
(Base) Company	Sample	(Base) Company	Sample	(Base) Company	Sample	Sample
Retail Sales	Companies	Retail Sales	Companies	Retail Sales	Wholesale	Retail
(millions)	(237)	(millions)	(133)	(millions)	Companies	Companies
Under \$10	30.0%	Under \$10	18.0%	Under \$10	5.1%	—
\$10-\$30	25.7%	\$10-\$30	17.3%	\$10-\$30	—	—
\$31-\$100	14.3%	\$31-\$100	19.5%	\$31-\$100	15.4%	9.1%
\$101-\$250	9.3%	\$101-\$250	17.3%	\$101-\$250	20.5%	16.4%
\$251-\$500	5.9%	\$251-\$500	6.8%	\$251-\$500	20.5%	10.9%
Over \$500	14.8%	Over 500	21.1%	Over \$500	38.5%	63.6%
	100%		100%		100%	100%

Sample Description For Food Marketing Industry Speaks

Distribution Center Operations Questionnaire

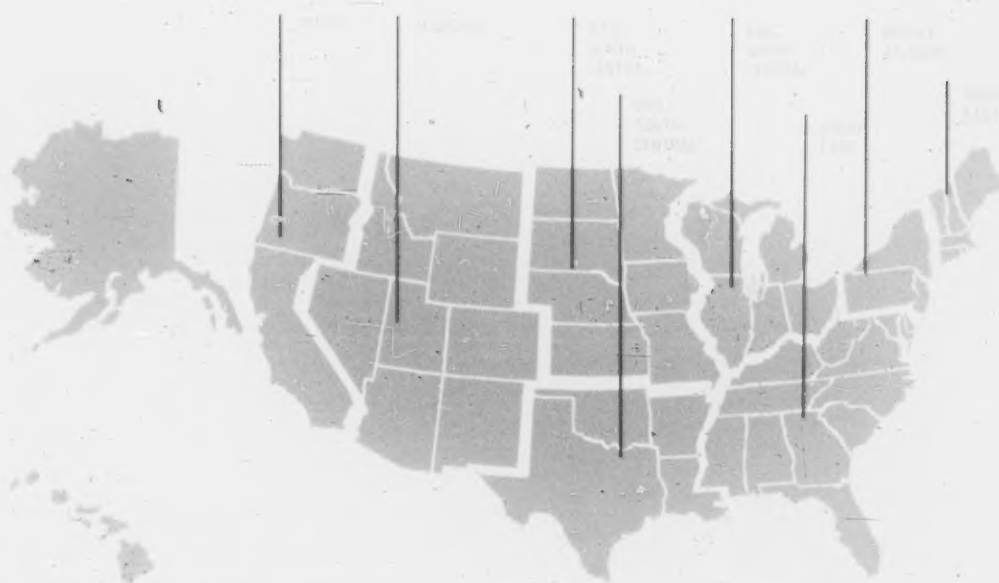
	Sample Wholesale Companies (57)	Sample Retail Companies (54)
\$10-\$30	2.8%	1.9%
\$31-\$100	16.2%	1.9%
\$101-\$250	18.9%	5.6%
\$251-\$500	16.2%	22.2%
Over \$500	45.9%	68.5%
	100%	100%

Store Level Training Questionnaire

(Base) Company Retail Sales (millions)	Sample Companies (209)
Under \$10	54.4%
\$10-\$30	21.5%
\$31-\$100	14.8%
\$101-\$250	11.5%
\$251-\$500	3.8%
Over \$500	13.9%
	100%

Wholesale Training Questionnaire

(Base) Company Retail Sales (millions)	Sample Companies (23)
Under \$10	26.1%
\$10-\$30	—
\$31-\$100	4.3%
\$101-\$250	21.7%
\$251-\$500	17.4%
Over \$500	30.4%
	100%



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**THE
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**DETAILED
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The Food Marketing Institute (FMI) is a non-profit association that conducts programs in research, education and public affairs on behalf of its 1,600 members—food retailers and wholesalers and their customers. FMI's domestic member companies operate more than 17,000 retail food stores with a combined annual sales volume of \$180 billion—half of all grocery sales in the United States. More than three-fourths of the FMI membership is composed of independent supermarket operators or small regional firms. Its international membership includes more than 190 members from over 50 nations.

Foreword

This publication is the companion report to *The Food Marketing Industry Speaks, 1988*. It contains the detailed tabulations for the information summarized in that report.

An annual survey of food wholesalers and retailers is the primary source of information for this report. Any data not taken from FMI's *Speaks* surveys are indicated by a footnote.

Data are for 1987. Company sales data are reported on an annual basis; productivity data, sales per labor hour, square foot or transaction, are reported on a weekly basis.

Except where noted, the term average is used to indicate mean figures. All other figures are medians. A median represents the halfway or middle figure when all figures are listed in order from smallest to largest. Data are presented only when four or more companies in a category answered the question, except for distribution centers when it is three or more.

In addition to presenting data for dry grocery distribution centers, *Speaks, 1988* also includes a section on frozen distribution centers. Figures in this section are presented for both wholesalers and retailers, as well as for all companies.

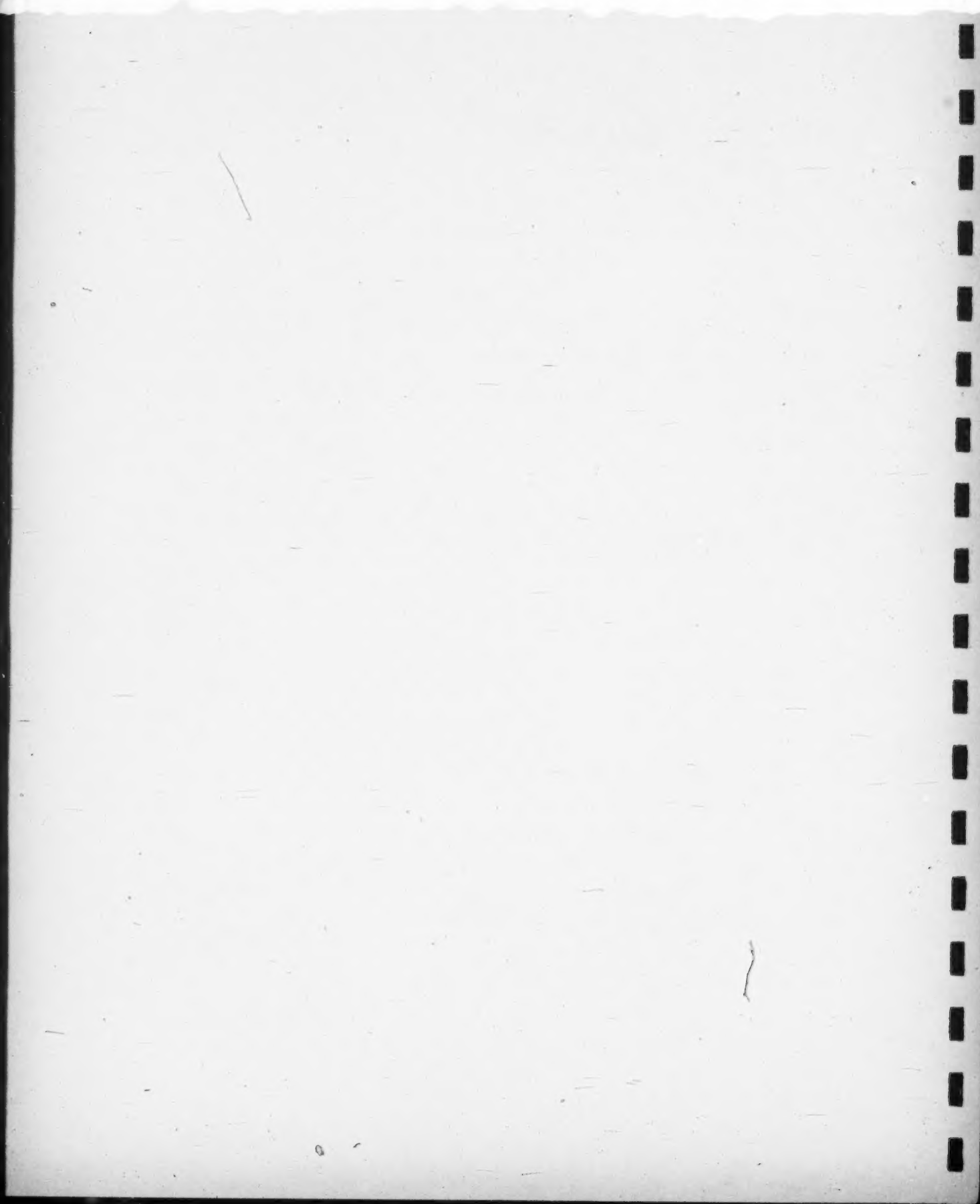
Other subject areas explored in depth this year are store-level personnel training, wholesale training, the buyer's function, and energy management.

Data for store profiles are found in Tables 70A and 70B. In these tables, sales and productivity figures are presented for four different types of grocery stores: conventional stores, super stores, combination stores, and warehouse stores.

In order to insure confidentiality of individual companies, some data within different subcategories have been changed plus or minus one percent.

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TABLE 1
GEOGRAPHIC REGION OF WHOLESALE HEADQUARTERS

	ALL WHOLESALE COMPANIES	1987 WHOLESALE SALES (MILLIONS OF DOLLARS)				WHOLESALE AFFILIATION		
		UNDER 101	101-250	251-500	OVER 500	COOP- ERATIVE	VOLUN- TARY	UNAFFI- LIATED
ALL COMPANIES	37	7	7	6	15	13	22	2
NORTHEAST	10.8	14.3	28.6	16.7	-	7.7	13.6	-
MIDDLE ATLANTIC	13.5	28.6	14.3	-	13.3	7.7	18.2	-
EAST NORTH CENTRAL	18.9	14.3	14.3	16.7	26.7	7.7	27.3	-
WEST NORTH CENTRAL	5.4	-	-	16.7	6.7	-	9.1	-
SOUTHEAST	18.9	42.9	14.3	16.7	6.7	30.8	9.1	-
WEST SOUTH CENTRAL	13.5	-	28.6	-	13.3	13.4	9.1	-
MOUNTAIN	-	-	-	-	-	-	-	-
PACIFIC	8.1	-	-	16.7	20.0	23.1	-	-
CANADA	10.8	-	-	16.7	20.0	7.7	13.6	-

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

WHOLESALE OPERATIONS

TABLE 2
TYPICAL PERCENT CHANGE IN WHOLESALE SALES
1986 VS 1987

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	4.6	.9	10.4	36
REGION				
NORTHEAST	5.2	-5.7	8.3	4
MIDDLE ATLANTIC	2.8	-1.6	5.0	5
EAST NORTH CENTRAL	4.1	1.8	6.7	7
WEST NORTH CENTRAL				2
SOUTHEAST	12.2	5.4	14.0	7
WEST SOUTH CENTRAL	9.4	3.2	13.0	4
MOUNTAIN				0
PACIFIC				3
CANADA	1.7	-5.0	7.9	4
COMPANY WHOLESALE SALES (IN MILLIONS OF DOLLARS)				
UNDER 101	5.4	3.3	6.7	7
101-250	7.1	9.9	14.0	7
OVER 250	3.6	1.8	9.5	21
NUMBER OF SUPERMARKETS SERVED				
1-10				1
11-50	5.4	2.8	6.7	7
51-100	13.1	8.2	23.7	4
OVER 100	3.6	-.2	8.7	20
WHOLESALE AFFILIATION				
COOPERATIVE	3.7	.1	12.2	13
VOLUNTARY	4.1	0	7.1	21
UNAFFILIATED				2

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

WHOLESALE OPERATIONS

TABLE 3
TYPICAL SALES PER RETAIL STORE SERVED
-- IN MILLIONS OF DOLLARS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	3.29	1.88	6.28	30
COMPANY WHOLESALE SALES (IN MILLIONS OF DOLLARS)				
UNDER 101	2.54	1.45	3.81	7
101-250	3.29	1.99	3.41	4
OVER 250	3.38	1.88	6.28	17
WHOLESALE AFFILIATION				
COOPERATIVE	2.38	1.86	3.25	9
VOLUNTARY	3.53	2.44	7.77	20
UNAFFILIATED				1

NOTE: UNWEIGHTED DATA

TABLE 4A
PERCENTAGE OF ANNUAL SALES VOLUME ATTRIBUTED TO --
SUMMARY TABLE OF MEANS

	ALL WHOLESALE COMPANIES	1987 WHOLESALE SALES (MILLIONS OF DOLLARS)				WHOLESALE AFFILIATION		
		UNDER 101	101-250	251-500	OVER 500	COOP- ERATIVE	VOLUN- TARY	UNAFFI- LIATED
TOTAL	35	7	7	6	13	12	21	2
INDEPENDENT FOOD STORES	63.2	78.7	57.9	67.2	66.7	69.4	63.3	
OTHER FOOD CHAINS	28.6	6	16.8	0	10.5	2.0	29.2	
CONVENIENCE STORES	4.4	15.7	4.9	8.5	8.4	6.9	4.3	
COMPANY OWNED STORES	3.5	2.4	19.1	18.8	11.8	16.2	2.9	
FOOD SERVICE/INSTITUTIONAL	.2	0	1.4	1.4	1.1	2.4	.1	
OTHER	.3	2.5	0	4.0	1.6	3.0	.2	

NOTE: DATA WEIGHTED BY 1987 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

WHOLESALE OPERATIONS

TABLE 4B
PERCENTAGE OF ANNUAL SALES VOLUME ATTRIBUTED TO --
SUMMARY TABLE OF MEANS

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS								CANADA
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	
TOTAL	88	8	10	16	7	15	10	4	7	11
COMPANY OWNED STORES	55.3	83.7	73.1	67.4	99.9	16.3	5.2	100.0	95.6	42.6
INDEPENDENT FOOD STORES	29.4	14.5	15.1	38.3	1	67.0	46.6	0	3.3	46.6
OTHER FOOD CHAINS	13.0	3	7.4	8.5	0	10.2	47.8	0	0	2.6
CONVENIENCE STORES	2.1	1.2	1.6	5.7	0	6.4	3	0	1	5.3
FOOD SERVICE/INSTITUTIONAL	.1	.2	2.0	0	0	0	0	0	.6	.8
OTHER	.1	.2	1.0	1	0	0	0	0	.3	2.2

TABLE 4C
PERCENTAGE OF ANNUAL SALES VOLUME ATTRIBUTED TO --
SUMMARY TABLE OF MEANS

	TOTAL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	1987 SALES (MILLIONS OF DOLLARS)			
				UNDER 101	101-250	251-500	OVER 500
TOTAL	88	53	35	9	9	16	42
COMPANY OWNED STORES	55.3	98.0	3.5	99.5	35.9	65.4	69.2
INDEPENDENT FOOD STORES	29.4	1.6	63.2	.4	45.8	29.0	23.4
OTHER FOOD CHAINS	13.0	.2	28.6	0	13.3	0	3.5
CONVENIENCE STORES	2.1	.2	6.4	.1	3.9	3.4	3.1
FOOD SERVICE/INSTITUTIONAL	.1	0	.2	0	1.1	.6	.3
OTHER	.1	0	.3	0	0	1.6	.5

NOTE: DATA WEIGHTED BY 1987 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

WHOLESALE OPERATIONS

TABLE 5
SERVICES PROVIDED TO MEMBERSHIP **

	ALL WHOLESALE COMPANIES	1987 WHOLESALE SALES (MILLIONS OF DOLLARS)				WHOLESALE AFFILIATION		
		UNDER 101	101-250	251-500	OVER 500	COOP- ERATIVE	VOLUN- TARY	UNAFFI- LIATED
TOTAL	37	7	7	6	15	13	22	2
INDIVIDUAL RETAIL PRICING	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
PRODUCT MOVEMENT DATA	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
ADVERTISING PROGRAM	97.3	100.0	85.7	100.0	100.0	100.0	95.5	
EQUIPMENT PROCUREMENT	97.3	85.7	100.0	100.0	100.0	100.0	95.5	
HANDLE PRIVATE LABEL	97.3	85.7	100.0	100.0	100.0	100.0	95.5	
HANDLE GENERIC LABEL	94.6	100.0	85.7	100.0	93.3	84.6	100.0	
SCANNING SUPPORT	91.9	71.4	85.7	100.0	100.0	84.6	95.5	
REAL ESTATE & STORE ENGINEERING	89.7	57.1	85.7	100.0	100.0	84.6	90.9	
GROSS MARGIN REPORT BY ITEM	89.2	71.4	100.0	100.0	86.7	76.9	95.5	
INTERIOR DECOR & DESIGN	83.8	57.1	85.7	83.3	93.3	69.2	90.9	
RETAIL ACCOUNTING	81.1	28.6	85.7	100.0	93.3	61.5	90.9	
DISCOUNT PROGRAMS	81.1	71.4	71.4	100.0	86.7	76.9	81.8	
MEMBER PAYROLL	78.4	28.6	100.0	83.3	93.3	69.2	81.8	
EQUIPMENT & FIXTURE FINANCING	78.4	14.3	85.7	100.0	93.3	69.2	81.8	
EDUCATION/TRAINING	73.0	14.3	71.4	83.3	93.3	53.8	81.8	
SPACE ALLOCATION	73.0	28.6	57.1	66.7	100.0	53.8	81.8	
DSD SYSTEM	73.0	28.6	71.4	83.3	86.7	46.2	86.4	
LEASE FINANCING	62.2	14.3	57.1	66.7	80.0	53.8	63.6	
OTHER	13.5	-	14.3	16.7	20.0	23.1	9.1	

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

DRY GROCERY DISTRIBUTION CENTER OPERATIONS

TABLE 6A
PROFILE OF COMPANIES

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS								CANADA
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	
ALL COMPANIES	91	9	10	16	8	15	10	4	8	11
RETAILERS	59.3	55.6	50.0	56.3	75.0	53.3	50.0	100.0	62.5	63.6
COOPERATIVE WHOLESALERS	14.3	11.1	10.0	6.3	-	26.7	20.0	-	37.5	9.1
VOLUNTARY WHOLESALERS	24.2	33.3	40.0	37.5	25.0	13.3	20.0	-	-	27.3
UNAFFILIATED WHOLESALERS	2.2	-	-	-	-	6.7	10.0	-	-	-

TABLE 6B
PROFILE OF COMPANIES

	TOTAL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	1987 SALES (MILLIONS OF DOLLARS)			
				UNDER 101	101-250	251-500	OVER 500
ALL COMPANIES	91	54	37	9	9	16	45
RETAILERS	59.3	100.0	-	22.2	22.2	62.5	66.7
COOPERATIVE WHOLESALERS	14.3	-	35.1	33.3	22.2	18.8	11.1
VOLUNTARY WHOLESALERS	24.2	-	59.5	44.4	44.4	18.8	20.0
UNAFFILIATED WHOLESALERS	2.2	-	5.4	-	11.1	-	2.2

TABLE 7
TYPICAL TOTAL AREA IN SQUARE FEET
OF THE DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
TOTAL CENTERS	250000	160000 388000	126
RETAIL CENTERS	256000	184000 409500	68
WHOLESALE CENTERS	245000	150000 336000	57

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

DRY GROCERY DISTRIBUTION CENTER OPERATIONS

TABLE 8
TYPE OF SELECTION METHOD IN DRY GROCERY
DISTRIBUTION CENTER/SECTION

	ALL CENTERS	SIZE OF DRY GROCERY DISTRIBUTION CENTER/SECTION IN SQUARE FEET				
		LESS THAN 100,000	100,000 TO 199,999	200,000 TO 299,999	300,000 TO 399,999	400,000 OR MORE
TOTAL CENTERS	122	14	25	30	22	28
MANUAL/CONVENTIONAL SELECTION	88.5	92.9	96.0	86.7	86.4	82.1
SELECT TO CONVEYOR	11.5	7.1	4.0	13.3	13.6	17.9

TABLE 9
TYPICAL NUMBER OF EMPLOYEES
IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
TOTAL CENTERS	108	59	198
SIZE OF DISTRIBUTION CENTER/SECTION			
LESS THAN 100,000	24	12	30
100,000-199,999	67	47	92
200,000-299,999	109	61	150
300,000-399,999	146	97	204
400,000 OR MORE	249	165	341

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

DRY GROCERY DISTRIBUTION CENTER OPERATIONS

TABLE 10
TYPICAL NUMBER OF CASES SHIPPED PER WEEK
IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	196000	100000	336125	128
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	22095	15000	50000	14
100,000-199,999	94573	61500	165000	27
200,000-299,999	195000	140000	215000	31
300,000-399,999	289823	192222	367735	23
400,000 OR MORE	417500	302000	580000	30

TABLE 11
TYPICAL NUMBER OF SUPERMARKETS SERVED PER
DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	81	55	159	126
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	45	17	128	12
100,000-199,999	73	53	103	28
200,000-299,999	62	44	115	30
300,000-399,999	110	70	250	23
400,000 OR MORE	130	65	215	30

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

DRY GROCERY DISTRIBUTION CENTER OPERATIONS

TABLE 12A
TYPICAL NUMBER OF ITEMS AVAILABLE
IN DRY GROCERY DISTRIBUTION CENTER/SECTION
-- ALL CENTERS

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
TOTAL CENTERS	6400	4900 8000	127
SIZE OF DISTRIBUTION CENTER/SECTION			
LESS THAN 100,000	3750	1400 5500	14
100,000-199,999	6235	4000 7500	27
200,000-299,999	6650	4800 9336	31
300,000-399,999	6450	5900 7500	22
400,000 OR MORE	6850	5680 9171	30

TABLE 12B
TYPICAL NUMBER OF ITEMS AVAILABLE
IN DRY GROCERY DISTRIBUTION CENTER/SECTION
-- WHOLESALE CENTERS

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
TOTAL CENTERS	7500	6400 8931	58
SIZE OF DISTRIBUTION CENTER/SECTION			
LESS THAN 100,000	4485	3000 5500	9
100,000-199,999	7500	6524 8347	14
200,000-299,999	8931	7670 10000	11
300,000-399,999	7100	6500 9672	11
400,000 OR MORE	7750	6850 9835	12

TABLE 12C
TYPICAL NUMBER OF ITEMS AVAILABLE
IN DRY GROCERY DISTRIBUTION CENTER/SECTION
-- RETAIL CENTERS

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
TOTAL CENTERS	5640	4400 6500	68
SIZE OF DISTRIBUTION CENTER/SECTION			
LESS THAN 100,000	2430	940 4300	5
100,000-199,999	4350	1104 5511	12
200,000-299,999	5215	4500 6942	20
300,000-399,999	5900	5213 6400	11
400,000 OR MORE	6000	5420 8678	18

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

DRY GROCERY DISTRIBUTION CENTER OPERATIONS

TABLE 13
TYPICAL NUMBER OF INVENTORY TURNS
IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	16	12	18	122
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	12	8	13	13
100,000-199,999	14	12	16	26
200,000-299,999	16	12	17	30
300,000-399,999	16	13	18	22
400,000 OR MORE	17	15	20	28

TABLE 14
CURRENT SCRATCH RATE IN DRY GROCERY
DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	3.0	.7	5.0	120
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	5.0	.6	7.0	14
100,000-199,999	3.2	.3	4.1	25
200,000-299,999	3.0	1.0	6.0	27
300,000-399,999	2.3	.6	4.0	21
400,000 OR MORE	2.0	.8	4.6	30

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

DRY GROCERY DISTRIBUTION CENTER OPERATIONS

TABLE 15
TYPICAL NUMBER OF INBOUND TRUCK LOADS PER WEEK
-- DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	199	125	300	121
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	32	12	50	13
100,000-199,999	127	60	186	24
200,000-299,999	190	140	245	31
300,000-399,999	252	199	350	22
400,000 OR MORE	323	229	475	28

TABLE 16
TYPICAL NUMBER OF INBOUND RAIL CARS PER WEEK
-- DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	0	0	2	121
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	0	0	0	12
100,000-199,999	0	0	3	25
200,000-299,999	0	0	1	30
300,000-399,999	0	0	4	23
400,000 OR MORE	0	0	5	28

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

DRY GROCERY DISTRIBUTION CENTER OPERATIONS

TABLE 17
TYPICAL NUMBER OF OUTBOUND VEHICLE LOADS PER WEEK
-- DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	207	118	315	120
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	26	11	45	12
100,000-199,999	127	90	200	25
200,000-299,999	175	135	222	30
300,000-399,999	288	240	385	23
400,000 OR MORE	350	268	500	27

TABLE 18
TYPICAL NUMBER OF CASES RECEIVED PER DIRECT LABOR HOUR
IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	390	272	845	109
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	200	102	417	12
100,000-199,999	720	280	1100	22
200,000-299,999	356	318	723	25
300,000-399,999	720	350	1025	21
400,000 OR MORE	376	250	678	26

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

DRY GROCERY DISTRIBUTION CENTER OPERATIONS

TABLE 19
TYPICAL NUMBER OF PALLETS STORED AND REPLENISHED PER DIRECT
LABOR HOUR IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
TOTAL CENTERS	18	13 24	94
SIZE OF DISTRIBUTION CENTER/SECTION			
LESS THAN 100,000	18	8 31	8
100,000-199,999	18	15 21	18
200,000-299,999	18	15 22	21
300,000-399,999	15	12 24	19
400,000 OR MORE	17	13 24	25

TABLE 20
TYPICAL NUMBER OF CASES SELECTED PER DIRECT LABOR HOUR
IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
TOTAL CENTERS	169	143 210	120
SIZE OF DISTRIBUTION CENTER/SECTION			
LESS THAN 100,000	130	90 185	13
100,000-199,999	169	145 200	26
200,000-299,999	177	156 208	29
300,000-399,999	169	125 250	21
400,000 OR MORE	164	140 184	28

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

DRY GROCERY DISTRIBUTION CENTER OPERATIONS

TABLE 21
TYPICAL NUMBER OF CASES SHIPPED PER DIRECT LABOR HOUR
IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	166	102	580	105
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	184	100	304	12
100,000-199,999	135	102	567	22
200,000-299,999	188	102	525	24
300,000-399,999	150	85	253	21
400,000 OR MORE	441	103	880	23

TABLE 22A
TYPICAL NUMBER OF ORDERS PROCESSED PER WEEK
-- WHOLESALE DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL WHOLESALE CENTERS	517	345	750	54
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 101	425	275	590	4
101-250	550	220	1100	7
OVER 250	504	345	705	41

TABLE 22B
TYPICAL NUMBER OF ORDERS PROCESSED PER WEEK
-- RETAIL DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL RETAIL CENTERS	238	162	330	67
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 101				1
101-250	78	57	129	4
251-500	155	112	222	11
OVER 500	265	208	453	50

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

DRY GROCERY DISTRIBUTION CENTER OPERATIONS

TABLE 23
TYPICAL NUMBER OF ORDERS PROCESSED PER WEEK
- RETAIL DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL RETAIL CENTERS	244	162	350	63
MANUAL/CONVENTIONAL SELECTION	244	155	375	56
SELECT TO CONVEYOR	230	171	273	7

TABLE 24
SHIFTS PER WEEK, DAYS PER WEEK OF OPERATION, AND
UNIONIZATION IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	ALL CENTERS	ALL RETAIL CENTERS	ALL WHOLESALE CENTERS
TOTAL CENTERS	124	69	54
SHIFTS PER WEEK			
FIVE TO SEVEN	16.1	20.3	11.1
EIGHT TO FOURTEEN	37.9	43.5	31.5
FIFTEEN TO TWENTY	33.1	26.1	42.6
TWENTY-ONE OR MORE	12.1	10.1	14.8
TOTAL CENTERS	123	69	54
DAYS OF OPERATION PER WEEK			
FIVE	31.7	30.4	33.3
SIX	43.1	43.5	42.6
SEVEN	25.2	26.1	24.1
TOTAL CENTERS	125	69	55
EMPLOYEES UNIONIZED			
YES	79.2	72.5	87.3
NO	20.8	27.5	12.7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

FROZEN DISTRIBUTION CENTER

TABLE 25
TYPICAL TOTAL AREA IN SQUARE FEET
OF THE FROZEN DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	37600	16000	68500	118
RETAIL CENTERS	45000	15950	75000	60
WHOLESALE CENTERS	30000	16000	50000	58

TABLE 26
PRIMARY TYPE OF SELECTION METHOD IN FROZEN
DISTRIBUTION CENTER/SECTION

	ALL CENTERS	SIZE OF FROZEN DISTRIBUTION CENTER/SECTION				
		LESS THAN 10,000	10,000 TO 19,999	20,000 TO 39,999	40,000 TO 59,999	60,000 OR MORE
TOTAL CENTERS	113	15	14	23	35	20
FROM SHELVING	92.0	100.0	92.9	91.3	88.6	95.0
FROM FLOW RACK	8.0		7.1	8.7	11.4	5.0
FROM CAROUSEL						

TABLE 27
TYPICAL NUMBER OF EMPLOYEES
IN FROZEN DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	18	7	35	124
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	2	2	4	17
10,000-19,999	6	3	11	18
20,000-39,999	18	8	27	27
40,000-79,999	28	20	50	34
80,000 OR MORE	34	29	88	20

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

FROZEN DISTRIBUTION CENTER

TABLE 28
TYPICAL NUMBER OF CASES SHIPPED PER WEEK
IN FROZEN DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	45065	20000	84000	118
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	5354	2100	7957	14
10,000-19,999	17977	11525	36500	16
20,000-39,999	40000	24000	50000	27
40,000-79,999	79850	55687	111733	36
80,000 OR MORE	100000	80163	203773	20

TABLE 29
TYPICAL NUMBER OF SUPERMARKETS SERVED PER
FROZEN DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	86	43	160	120
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	39	22	70	14
10,000-19,999	39	23	115	18
20,000-39,999	85	60	160	27
40,000-79,999	101	62	191	36
80,000 OR MORE	135	96	271	20

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

FROZEN DISTRIBUTION CENTER

TABLE 30
TYPICAL NUMBER OF ITEMS AVAILABLE
IN FROZEN DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	1000	600	1500	119
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	226	110	550	15
10,000-19,999	774	463	1095	16
20,000-39,999	1000	750	1400	27
40,000-79,999	1240	950	1600	35
80,000 OR MORE	1500	915	2289	20

TABLE 31
TYPICAL NUMBER OF INVENTORY TURNS
IN FROZEN DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	18	15	26	114
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	25	15	42	15
10,000-19,999	16	12	23	17
20,000-39,999	16	14	24	25
40,000-79,999	18	15	26	33
80,000 OR MORE	21	16	28	19

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

FROZEN DISTRIBUTION CENTER

TABLE 32
CURRENT SCRATCH RATE IN FROZEN
DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
TOTAL CENTERS	2.0	.5 4.0	107
SIZE OF DISTRIBUTION CENTER/SECTION			
LESS THAN 10,000	3.0	.4 3.5	9
10,000-19,999	3.5	.8 4.8	17
20,000-39,999	2.8	1.2 4.0	23
40,000-79,999	1.5	.4 3.0	34
80,000 OR MORE	1.4	.6 3.0	19

TABLE 33
TYPICAL NUMBER OF INBOUND LOADS PER WEEK
IN FROZEN DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
TOTAL CENTERS	40	22 80	113
SIZE OF DISTRIBUTION CENTER/SECTION			
LESS THAN 10,000	5	2 8	16
10,000-19,999	25	20 35	17
20,000-39,999	35	26 52	25
40,000-79,999	65	39 95	35
80,000 OR MORE	119	80 170	16

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

FROZEN DISTRIBUTION CENTER

TABLE 34

TYPICAL NUMBER OF INBOUND RAIL CARS PER WEEK
IN FROZEN DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
TOTAL CENTERS	0	0	102
SIZE OF DISTRIBUTION CENTER/SECTION			
LESS THAN 10,000	0	0	11
10,000-19,999	0	0	17
20,000-39,999	0	0	21
40,000-79,999	0	0	33
80,000 OR MORE	0	0	17

TABLE 35

TYPICAL NUMBER OF OUTBOUND VEHICLE LOADS PER WEEK
IN FROZEN DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
TOTAL CENTERS	60	28	128
SIZE OF DISTRIBUTION CENTER/SECTION			
LESS THAN 10,000	8	5	16
10,000-19,999	23	13	100
20,000-39,999	50	23	123
40,000-79,999	66	40	117
80,000 OR MORE	147	100	255

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

FROZEN DISTRIBUTION CENTER

TABLE 36

TYPICAL NUMBER OF CASES RECEIVED PER DIRECT LABOR HOUR
IN FROZEN DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
TOTAL CENTERS	488	277 912	96
SIZE OF DISTRIBUTION CENTER/SECTION			
LESS THAN 10,000	568	250 800	14
10,000-19,999	508	228 850	12
20,000-39,999	425	280 950	20
40,000-79,999	583	307 1113	32
80,000 OR MORE	432	225 504	16

TABLE 37

TYPICAL NUMBER OF CASES STORED AND REPLENISHED PER DIRECT
LABOR HOUR IN FROZEN DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
TOTAL CENTERS	310	30 640	79
SIZE OF DISTRIBUTION CENTER/SECTION			
LESS THAN 10,000	60	18 1013	12
10,000-19,999	150	25 409	8
20,000-39,999	311	142 530	19
40,000-79,999	494	32 723	25
80,000 OR MORE	335	60 527	13

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

FROZEN DISTRIBUTION CENTER

TABLE 38

TYPICAL NUMBER OF CASES SELECTED PER DIRECT LABOR HOUR
IN FROZEN DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	175	145	210	111
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	192	107	202	16
10,000-19,999	175	150	200	17
20,000-39,999	163	145	200	22
40,000-79,999	181	156	220	34
80,000 OR MORE	180	138	213	19

TABLE 39

TYPICAL NUMBER OF CASES SHIPPED PER DIRECT LABOR HOUR
IN FROZEN DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	136	96	233	96
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	160	120	250	15
10,000-19,999	130	102	320	13
20,000-39,999	138	105	200	19
40,000-79,999	131	88	334	32
80,000 OR MORE	135	92	200	15

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

FROZEN DISTRIBUTION CENTER

TABLE 40

TYPICAL NUMBER OF ORDERS PROCESSED PER WEEK
IN FROZEN DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	271	148	450	112
COMPANY SALES (IN MILLIONS OF DOLLARS)				
30 OR LESS				1
31-100	166	30	450	10
101-250	400	124	750	7
OVER 250	260	150	500	91

TABLE 41

SHIFTS PER WEEK, DAYS PER WEEK OF OPERATION, AND
UNIONIZATION IN FROZEN DISTRIBUTION CENTER/SECTION

	ALL CENTERS	RETAIL CENTERS	WHOLESALE CENTERS
TOTAL CENTERS	113	59	54
SHIFTS PER WEEK			
FIVE TO SEVEN	21.2	28.8	13.0
EIGHT TO FOURTEEN	51.3	57.6	44.4
FIFTEEN TO TWENTY	19.5	8.5	31.5
TWENTY-ONE OR MORE	6.2	1.7	11.1
TOTAL CENTERS	116	62	54
DAYS OF OPERATION PER WEEK			
FIVE	44.8	46.8	49.6
SIX	35.3	33.9	37.0
SEVEN	18.1	16.1	20.4
TOTAL CENTERS	113	59	54
EMPLOYEES UNIONIZED			
YES	80.5	71.2	90.7
NO	19.5	28.8	9.3

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

FLEET OPERATIONS

TABLE 42
PROPORTION OF FLEET OWNED VS. LEASED

	TOTAL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	1987 SALES (MILLIONS OF DOLLARS)			
				UNDER 101	101-250	251-500	OVER 500
TOTAL	82	48	34	8	8	15	39
PROPORTION OF TRAILERS OWNED	94.5	96.4	89.8	96.9	75.4	96.0	95.4
TOTAL	76	44	32	6	8	13	37
PROPORTION OF TRACTORS OWNED	89.1	93.8	80.6	100.0	57.0	91.1	90.8
TOTAL	68	40	28	6	8	12	33
PROPORTION OF TRUCK FLEET MILES DRIVEN ON OWNED FLEET	93.0	95.2	87.5	100.0	69.7	89.4	93.4

TABLE 43
TYPE OF TRACTORS/TRAILERS

	TOTAL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	1987 SALES (MILLIONS OF DOLLARS)			
				UNDER 101	101-250	251-500	OVER 500
TOTAL	86	50	36	8	9	15	42
AVERAGE NUMBER OF TRAILERS	233	276	171	28	94	94	375
* REFRIGERATED	46.8	47.5	44.9	36.6	39.7	44.5	49.3
* DRY	53.2	52.5	55.1	63.4	60.3	55.5	50.7
TOTAL	80	46	34	6	9	13	40
AVERAGE NUMBER OF TRACTORS	95	101	86	13	39	40	153
* 3-AXLE	89.1	89.3	88.7	89.2	69.0	76.4	90.9
* 2-AXLE	10.9	10.7	11.3	10.8	31.0	23.6	9.1
TOTAL	80	46	34	6	9	13	40
RATIO TRAILERS TO TRACTORS	2.5	2.7	2.0	2.1	2.4	2.3	2.5

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

FLEET OPERATIONS

TABLE 44
FLEET EFFICIENCY

	TOTAL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	1987 SALES (MILLIONS OF DOLLARS)			
				UNDER 101	101-250	251-500	OVER 500
TOTAL	82	49	33	6	9	13	42
AVERAGE NUMBER OF FLEET MILES	6561241	7515794	5143875	638531	2304988	2514309	10478966
TOTAL	76	45	31	6	8	12	40
AVERAGE \$ AMOUNT SPENT FOR FUEL	1330858	1442031	1169478	105216	322131	408824	2176367
TOTAL	77	45	32	6	9	12	38
AVERAGE GALLONS PURCHASED	1199634	1307882	1047410	118451	394447	493306	1986192
TOTAL	80	47	33	6	9	13	41
AVERAGE FLEET MPG	5.48	5.37	5.64	6.08	5.22	5.32	5.55
TOTAL	77	45	32	6	9	12	38
DOLLARS PER GALLON	1.06	1.05	1.08	.89	.73	.83	1.11

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

TABLE 45
NUMBER OF DRIVERS EMPLOYED IN A TYPICAL WEEK PER COMPANY

	TOTAL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	1987 SALES (MILLIONS OF DOLLARS)			
				UNDER 101	101-250	251-500	OVER 500
TOTAL	86	51	35	9	9	14	42
FULL TIME	131.5	144.9	111.9	18.8	44.4	45.3	219.3
COMPANY	130.2	143.0	111.5	17.9	44.4	44.2	218.1
HIRED SERVICE	1.3	1.9	.4	.9	0	1.1	1.1
PART-TIME	9.1	8.0	10.6	.1	3.4	4.1	15.2
COMPANY	8.9	8.0	10.2	.1	3.4	3.4	15.1
HIRED SERVICE	.2	0	.4	0	0	.7	.1
TOTAL	78	45	33	6	9	12	39
WEIGHTED RATIO OF TOTAL FULL-TIME DRIVERS TO TRACTORS	1.45	1.63	1.06	.09	1.12	1.86	1.47

NOTE: UNWEIGHTED DATA, EXCEPT FOR DRIVERS/TRACTORS RATIO, WHICH IS WEIGHTED BY 1987 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

TABLE 46
AVERAGE DISTANCE BETWEEN CENTER AND STORES SERVED

	GEOGRAPHIC REGION OF DISTRIBUTION CENTER									
	ALL CENTERS	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	120	12	10	23	12	20	12	8	10	13
AVERAGE DISTANCE BETWEEN CENTER AND STORES SERVED	99.2	78.4	61.4	91.8	95.0	99.5	105.7	191.7	82.1	114.7
WHOLESALE (AVG. MILES)	97.7	101.0	55.8	109.4	88.0	113.9	75.7	135.0	87.7	71.2
RETAILERS (AVG. MILES)	100.3	62.3	65.2	68.9	98.5	77.8	115.7	210.7	79.7	141.9
1987 SALES (IN MILLIONS OF DOLLARS)										
< 100 (AVG. MILES)	62.2	67.5	37.5	100.0	50.0	68.3	50.0	50.0	50.0	50.0
101-250 (AVG. MILES)	91.1	160.0	0	78.0	0	50.0	0	0	75.0	0
251-500 (AVG. MILES)	102.5	50.0	100.0	76.0	63.8	197.0	0	192.7	96.0	60.0
501 + (AVG. MILES)	121.2	75.0	66.5	98.5	141.0	119.0	126.6	288.7	106.6	134.1

TABLE 47
LONGEST DISTANCE BETWEEN CENTER AND STORE SERVED

	GEOGRAPHIC REGION OF DISTRIBUTION CENTER									
	ALL CENTERS	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	114	11	10	22	12	19	11	7	8	13
LONGEST DISTANCE BETWEEN CENTER AND STORES SERVED	268.4	233.6	218.3	221.6	254.2	225.8	318.0	366.4	349.9	348.5
WHOLESALE (AVG. MILES)	266.7	226.0	190.7	292.7	205.0	228.8	293.3	200.0	240.7	479.2
RETAILERS (AVG. MILES)	269.7	240.0	236.7	136.3	278.8	220.6	327.2	433.0	415.4	266.9
1987 SALES (IN MILLIONS OF DOLLARS)										
< 100 (AVG. MILES)	176.2	250.0	110.0	265.0	150.0	160.7	150.0	150.0	150.0	150.0
101-250 (AVG. MILES)	221.6	100.0	0	141.0	0	189.0	0	0	650.0	0
251-500 (AVG. MILES)	311.3	315.0	227.0	180.2	148.8	250.0	0	357.7	300.0	1500.0
501 + (AVG. MILES)	297.4	300.0	246.0	260.1	343.3	262.6	354.6	447.3	403.0	261.9

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 48
NUMBER OF SUPERMARKETS COMPANY OPERATES

	GEOGRAPHICAL REGION OF STORES					
	ALL COMPANIES	MOUNTAIN AND PACIFIC	WEST SOUTH CENTRAL	NORTH CENTRAL	EAST COAST	MULTI- REGIONAL
TOTAL	237	33	14	79	85	3
1	33.8	36.4	21.4	39.2	38.8	-
2-10	35.0	36.4	28.6	34.2	40.0	-
11-49	17.7	18.2	35.7	17.7	11.8	-
50 AND OVER	13.5	9.1	14.3	8.9	9.4	100.0

TABLE 49
RETAIL SALES IN 1987

	GEOGRAPHICAL REGION OF STORES					
	ALL COMPANIES	MOUNTAIN AND PACIFIC	WEST SOUTH CENTRAL	NORTH CENTRAL	EAST COAST	MULTI- REGIONAL
TOTAL	237	33	14	79	85	3
UNDER 10 MILLION	30.0	36.4	14.3	35.4	31.8	-
10 - 30 MILLION	25.7	24.2	28.6	20.3	35.3	-
31 - 100 MILLION	14.3	6.1	28.6	17.7	11.8	-
101 - 250 MILLION	9.3	15.2	7.1	10.1	7.1	-
251 - 500 MILLION	5.9	9.1	-	7.6	2.4	-
OVER 500 MILLION	14.8	9.1	21.4	8.9	11.8	100.0

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 50A
PERCENTAGE OF OPERATION SUPPLIED BY

	ALL COMPANIES	RETAIL AFFIL.		1986 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE- PENDENT	UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501+
TOTAL	220	69	151	70	55	30	19	14	32
OWN WAREHOUSE	56.4	63.6	2.9	7.6	3.5	25.6	13.2	40.5	62.5
VOLUNTARY WHOLESALER	9.3	3.5	52.4	36.4	49.3	16.8	14.5	8.8	7.9
COOPERATIVE WHOLESALER	5.0	4.6	8.0	21.3	11.9	14.3	28.4	22.1	1.6
UNAFFILIATED WHOLESALER	3.4	3.3	4.0	6.4	6.1	12.1	15.2	2.8	2.4
DIRECT VENDOR DELIVERIES	26.0	25.1	32.7	28.2	29.2	31.2	26.7	25.7	25.7

TABLE 50B
PERCENTAGE OF OPERATION SUPPLIED BY

	ALL COMPANIES	GEOGRAPHICAL REGION OF STORES				
		MOUNTAIN AND PACIFIC	WEST SOUTH CENTRAL	NORTH CENTRAL	EAST COAST	MULTI- REGIONAL
TOTAL	220	32	11	74	80	2
OWN WAREHOUSE	56.4	65.9	66.7	41.7	53.2	
VOLUNTARY WHOLESALER	9.3	4.7	5	21.9	9.4	
COOPERATIVE WHOLESALER	5.0	4.0	2	3.6	12.4	
UNAFFILIATED WHOLESALER	3.4	2.8	11.8	3.7	1.6	
DIRECT VENDOR DELIVERIES	26.0	22.6	20.8	29.0	23.3	

NOTE: DATA WEIGHTED BY 1987 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 51A
TYPICAL PERCENTAGE OF OPERATIONS
SUPPLIED BY OUTSIDE WHOLESALERS
AND DIRECT VENDOR DELIVERIES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	100.0	69.0	100.0	220
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	100.0	100.0	100.0	70
10 - 30 MILLION	100.0	100.0	100.0	55
31 - 100 MILLION	91.0	40.0	100.0	30
101 - 250 MILLION	100.0	73.0	100.0	19
251 - 500 MILLION	55.0	33.7	100.0	14
OVER 500 MILLION	30.0	20.0	50.8	32
GEOGRAPHIC REGION OF STORES				
MOUNTAIN & PACIFIC	100.0	74.0	100.0	32
WEST SOUTH CENTRAL	100.0	30.0	100.0	11
NORTH CENTRAL	100.0	85.0	100.0	74
EAST COAST	100.0	99.0	100.0	80
MULTIREGIONAL				2
CANADA	45.1	41.4	100.0	8
RETAIL AFFILIATION				
CHAIN	40.0	25.0	96.0	69
INDEPENDENT	100.0	100.0	100.0	151

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 51B
TYPICAL PERCENTAGE OF OPERATIONS
SUPPLIED BY OUTSIDE WHOLESALERS
AND DIRECT VENDOR DELIVERIES

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING	
PERCENT CHANGE IN RETAIL SALES IN ALL STORES 1986 VS. 1987				
ALL COMPANIES				
TOTAL	100.0	68.0	100.0	214
BOTTOM ALL STORE GROWTH	100.0	86.7	100.0	72
TOP ALL STORE GROWTH	100.0	80.0	100.0	14
COMPANIES WITH 1 TO 5 STORES				
TOTAL	100.0	100.0	100.0	135
BOTTOM ALL STORE GROWTH	100.0	100.0	100.0	55
TOP ALL STORE GROWTH	100.0	100.0	100.0	10
COMPANIES WITH 6+ STORES				
TOTAL	46.3	26.0	100.0	79
BOTTOM ALL STORE GROWTH	40.0	30.0	83.3	17
TOP ALL STORE GROWTH	50.0	28.8	75.0	4

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1986 VS. 1987.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 52A
TYPICAL PERCENT CHANGE IN RETAIL SALES
1986 VS. 1987

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
ALL COMPANIES	5.5	1.0 9.5	230
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)			
UNDER 10	3.7	0 8.4	68
10 - 30	4.8	0 9.1	59
31 - 100	6.8	3.0 12.2	33
101 - 250	6.1	5.6 11.2	21
251 - 500	1.7	-1.8 3.8	14
OVER 500	7.5	5.0 12.0	35
REGION - CHAIN STORES			
MOUNTAIN & PACIFIC	7.7	4.8 11.2	9
WEST SOUTH CENTRAL	6.9	2.4 7.7	7
NORTH CENTRAL	3.1	-2 6.8	21
EAST COAST	7.4	5.5 13.5	17
MULTIREGIONAL			3
CANADA	8.0	4.9 10.6	5
REGION - INDEPENDENT STORES			
MOUNTAIN & PACIFIC	5.6	0 8.7	23
WEST SOUTH CENTRAL	0	-5.6 11.1	7
NORTH CENTRAL	4.7	0 9.4	56
EAST COAST	4.7	0 9.3	64
CANADA			3

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 52B
TYPICAL PERCENT CHANGE IN RETAIL SALES
1986 VS. 1987

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
PERCENT CHANGE IN RETAIL SALES IN ALL STORES 1986 VS. 1987			
ALL COMPANIES			
TOTAL	5.5	1.0 - 9.5	230
BOTTOM ALL STORE GROWTH	3.1	0 - 7.7	75
TOP ALL STORE GROWTH	16.4	-11.8 - 21.1	14
COMPANIES WITH 1 TO 5 STORES			
TOTAL	6.7	0 - 9.1	141
BOTTOM ALL STORE GROWTH	3.4	0 - 8.7	57
TOP ALL STORE GROWTH	14.1	11.1 - 21.1	10
COMPANIES WITH 6+ STORES			
TOTAL	6.1	2.8 - 11.2	87
BOTTOM ALL STORE GROWTH	1.5	-4.5 - 5.3	18
TOP ALL STORE GROWTH	18.9	15.5 - 26.6	4

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1986 VS. 1987.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 53A
TYPICAL PERCENT CHANGE IN RETAIL SALES
IDENTICAL STORES 1986 VS. 1987 **

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	4.0	.1	7.0	174
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	3.2	0	7.1	28
10 - 30	4.9	0	9.1	50
31 - 100	4.5	1.1	6.9	31
101 - 250	5.0	2.7	6.3	20
251 - 500	1.5	-1.8	7.1	11
OVER 500	7.5	1.5	6.9	10
REGION - CHAIN STORES				
MOUNTAIN & PACIFIC	2.1	1.5	5.6	9
WEST SOUTH CENTRAL	3.5	1.5	5.1	7
NORTH CENTRAL	7.7	2	5.7	18
EAST COAST	3.9	1.7	7.4	16
MULTIREGIONAL				3
CANADA				3
REGION - INDEPENDENT STORES				
MOUNTAIN & PACIFIC	5.0	0	8.7	14
WEST SOUTH CENTRAL	0	-5.6	0	5
NORTH CENTRAL	4.1	1.6	6.7	33
EAST COAST	5.3	2.5	8.8	50
CANADA				2

** INCLUDES ONLY THOSE STORES OPEN DURING ENTIRE TWO-YEAR PERIOD OF 1986-1987

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 53B
TYPICAL PERCENT CHANGE IN RETAIL SALES
IDENTICAL STORES 1986 VS. 1987 **

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
PERCENT CHANGE IN RETAIL SALES IN ALL STORES 1986 VS. 1987			
ALL COMPANIES			
TOTAL	4.0	0 7.0	172
BOTTOM ALL STORE GROWTH	-1.8	-4.2 0	25
TOP ALL STORE GROWTH	14.8	11.8 18.1	14
COMPANIES WITH 1 TO 5 STORES			
TOTAL	4.8	1 8.1	93
BOTTOM ALL STORE GROWTH	0	-2.9 0	13
TOP ALL STORE GROWTH	14.1	11.1 18.1	10
COMPANIES WITH 6+ STORES			
TOTAL	2.9	0 6.1	79
BOTTOM ALL STORE GROWTH	-2.9	-5.2 -1.6	12
TOP ALL STORE GROWTH	15.9	13.6 18.7	4

** INCLUDES ONLY THOSE STORES OPEN DURING ENTIRE TWO-YEAR PERIOD OF 1986-1987

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1986 VS. 1987.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 54A

TYPICAL WEEKLY SALES (IN DOLLARS) PER SUPERMARKET IN 1987

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	184210	131753	238433	7525
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	89200	67500	118000	86
10 - 30	120000	83750	205845	144
31 - 100	101974	87500	160000	297
101 - 250	177000	123038	252000	353
251 - 500	170500	123000	275000	466
OVER 500	187017	131753	238433	6179
GEOGRAPHIC REGION OF STORES				
MOUNTAIN & PACIFIC	312154	176000	336613	604
WEST SOUTH CENTRAL	273850	133013	273850	365
NORTH CENTRAL	180457	127000	225000	905
EAST COAST	255000	99112	366789	1007
MULTIREGIONAL	235128	131753	235128	2780
CANADA	110000	110000	131427	1003
RETAIL AFFILIATION				
CHAIN	187017	131753	238433	7144
INDEPENDENT	145000	92000	200000	381

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 54B

TYPICAL WEEKLY SALES (IN DOLLARS) PER SUPERMARKET IN 1987

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
PERCENT CHANGE IN RETAIL SALES IN ALL STORES 1986 VS. 1987			
ALL COMPANIES			
TOTAL	184210	131753 238433	7501
BOTTOM ALL STORE GROWTH	131427	116633 160256	1507
TOP ALL STORE GROWTH	226800	226800 271520	151
COMPANIES WITH 1 TO 5 STORES			
TOTAL	119540	82500 184000	263
BOTTOM ALL STORE GROWTH	100000	80000 130770	69
TOP ALL STORE GROWTH	130000	119540 160000	20
COMPANIES WITH 6+ STORES			
TOTAL	187017	131753 238433	7236
BOTTOM ALL STORE GROWTH	131427	121000 160256	1438
TOP ALL STORE GROWTH	226800	226800 271520	131

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1986 VS. 1987.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 55A

TYPICAL WEEKLY SALES (IN DOLLARS) PER CHECKOUT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	20980	14640	27501	5471
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	17880	15666	20000	83
10 - 30	18000	15750	22500	133
31 - 100	16627	10200	21368	296
101 - 250	20718	18559	23825	327
251 - 500	22400	19430	26000	375
OVER 500	20776	14640	27501	4257
GEOGRAPHIC REGION OF STORES				
MOUNTAIN & PACIFIC	30884	19430	34684	582
WEST SOUTH CENTRAL	27031	18559	27031	299
NORTH CENTRAL	21928	18045	24000	827
EAST COAST	29500	17501	31684	781
MULTIREGIONAL	14640	14640	27501	1735
CANADA	20776	20776	21600	823
RETAIL AFFILIATION				
CHAIN	20900	14640	27501	5109
INDEPENDENT	20000	17000	24571	362

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 55B
TYPICAL WEEKLY SALES (IN DOLLARS) PER CHECKOUT

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
PERCENT CHANGE IN RETAIL SALES IN ALL STORES 1986 VS. 1987			
ALL COMPANIES			
TOTAL	20980	14640 27501	5447
BOTTOM ALL STORE GROWTH	20776	18541 21600	1428
TOP ALL STORE GROWTH	28352	24571 28352	80
COMPANIES WITH 1 TO 5 STORES			
TOTAL	18571	15900 23651	753
BOTTOM ALL STORE GROWTH	20000	16000 22100	73
TOP ALL STORE GROWTH	23651	16666 53333	14
COMPANIES WITH 6+ STORES			
TOTAL	20980	14640 27501	5194
BOTTOM ALL STORE GROWTH	20776	20000 21600	1355
TOP ALL STORE GROWTH	28352	28352 28352	66

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1986 VS. 1987.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 56A
TYPICAL SALE (IN DOLLARS) PER CUSTOMER TRANSACTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	16.30	13.58	20.98	6105
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	12.40	10.50	14.50	85
10 - 30	14.50	11.75	16.70	120
31 - 100	13.00	11.83	16.00	310
101 - 250	14.24	12.05	20.58	355
251 - 500	15.31	14.13	16.44	375
OVER 500	16.35	13.58	21.41	4860
REGION - CHAIN STORES				
MOUNTAIN & PACIFIC	19.04	14.00	19.07	530
WEST SOUTH CENTRAL	14.12	13.83	16.52	347
NORTH CENTRAL	14.75	13.76	19.49	880
EAST COAST	21.72	16.47	21.90	796
MULTIREGIONAL	13.58	13.58	16.31	1735
CANADA	21.41	21.41	25.00	987
REGION - INDEPENDENT STORES				
MOUNTAIN & PACIFIC	14.22	10.88	17.50	52
WEST SOUTH CENTRAL	11.00	10.29	11.50	12
NORTH CENTRAL	14.67	12.11	20.45	141
EAST COAST	16.00	14.00	19.00	120
CANADA	21.25	20.00	22.50	5

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 56B

TYPICAL SALE (IN DOLLARS) PER CUSTOMER TRANSACTION

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
PERCENT CHANGE IN RETAIL SALES IN ALL STORES 1986 VS. 1987			
ALL COMPANIES			
TOTAL	16.30	13.58 20.98	6080
BOTTOM ALL STORE GROWTH	21.41	14.75 22.80	1596
TOP ALL STORE GROWTH	20.98	16.47 20.98	151
COMPANIES WITH 1 TO 5 STORES			
TOTAL	14.50	11.75 17.30	237
BOTTOM ALL STORE GROWTH	13.00	10.71 15.10	70
TOP ALL STORE GROWTH	14.00	10.80 25.17	20
COMPANIES WITH 6+ STORES			
TOTAL	16.31	13.58 20.98	5843
BOTTOM ALL STORE GROWTH	21.41	15.00 22.80	1526
TOP ALL STORE GROWTH	20.98	16.47 20.98	131

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1986 VS. 1987.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 57A
TYPICAL SALES (IN DOLLARS) PER LABOR HOUR FOR STORE
EMPLOYEES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	101.00	85.00	118.12	4618
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	73.08	63.64	83.29	64
10 - 30	79.00	70.00	98.60	103
31 - 100	82.35	74.00	105.00	271
101 - 250	87.24	77.64	92.59	317
251 - 500	83.00	78.46	95.48	444
OVER 500	101.18	88.87	118.56	3419
REGION - CHAIN STORES				
MOUNTAIN & PACIFIC	118.12	118.12	143.25	514
WEST SOUTH CENTRAL	80.54	80.05	82.12	347
NORTH CENTRAL	87.17	85.00	95.48	696
EAST COAST	95.99	92.59	104.90	827
MULTIREGIONAL	101.18	101.18	101.18	464
CANADA	118.56	114.46	125.00	998
REGION - INDEPENDENT STORES				
MOUNTAIN & PACIFIC	89.75	84.00	119.70	46
WEST SOUTH CENTRAL	80.00	80.00	83.33	8
NORTH CENTRAL	79.19	71.75	98.50	122
EAST COAST	82.00	70.00	97.50	96

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 57B
TYPICAL SALES (IN DOLLARS) PER LABOR HOUR FOR STORE
EMPLOYEES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
PERCENT CHANGE IN RETAIL SALES IN ALL STORES 1986 VS. 1987				
ALL COMPANIES				
TOTAL	101.00	85.00	118.12	4594
BOTTOM ALL STORE GROWTH	118.56	95.48	118.56	1410
TOP ALL STORE GROWTH	95.42	80.55	95.42	147
COMPANIES WITH 1 TO 5 STORES				
TOTAL	81.00	70.00	99.45	196
BOTTOM ALL STORE GROWTH	83.00	70.00	88.00	55
TOP ALL STORE GROWTH	112.42	75.00	115.00	16
COMPANIES WITH 6+ STORES				
TOTAL	101.18	86.47	118.12	4398
BOTTOM ALL STORE GROWTH	118.56	95.48	125.00	1355
TOP ALL STORE GROWTH	90.00	80.55	95.42	131

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1986 VS. 1987.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 58A
TYPICAL WEEKLY SALES (IN DOLLARS) PER SQUARE FOOT
OF SELLING AREA

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	8.80	7.55	11.18	7395
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	7.30	5.89	10.82	81
10 - 30	8.59	5.91	12.50	122
31 - 100	6.10	4.25	7.44	277
101 - 250	8.73	6.68	12.34	313
251 - 500	7.20	5.67	9.42	423
OVER 500	8.74	7.55	10.64	6179
REGION - CHAIN STORES				
MOUNTAIN & PACIFIC	11.99	7.20	13.27	530
WEST SOUTH CENTRAL	9.70	6.68	9.70	347
NORTH CENTRAL	8.60	6.00	9.43	764
EAST COAST	13.83	10.09	16.33	801
MULTIREGIONAL	8.75	7.55	8.75	2780
CANADA	13.00	9.06	15.00	998
REGION - INDEPENDENT STORES				
MOUNTAIN & PACIFIC	9.67	5.87	13.20	51
WEST SOUTH CENTRAL	6.67	5.02	40.00	18
NORTH CENTRAL	7.77	6.52	11.18	132
EAST COAST	8.86	7.00	15.16	136
CANADA	10.12	10.12	75.18	5

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 588
TYPICAL WEEKLY SALES (IN DOLLARS) PER SQUARE FOOT
OF SELLING AREA

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
PERCENT CHANGE IN RETAIL SALES IN ALL STORES 1986 VS. 1987			
ALL COMPANIES			
TOTAL	8.80	7.55 11.18	7387
BOTTOM ALL STORE GROWTH	9.06	8.90 11.64	1471
TOP ALL STORE GROWTH	13.35	10.37 13.35	149
COMPANIES WITH 1 TO 5 STORES			
TOTAL	8.88	6.42 13.89	252
BOTTOM ALL STORE GROWTH	8.39	6.15 12.15	66
TOP ALL STORE GROWTH	17.56	7.04 19.04	18
COMPANIES WITH 6+ STORES			
TOTAL	8.75	7.55 10.64	7135
BOTTOM ALL STORE GROWTH	9.06	9.06 11.64	1405
TOP ALL STORE GROWTH	10.37	10.37 13.35	131

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1986 VS. 1987.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 59A

TOTAL SIZE (IN SQUARE FEET) OF TYPICAL SUPERMARKET

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	31000	25164	36366	7433
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	15750	11000	20000	86
10 - 30	25000	18000	35000	125
31 - 100	17538	15000	24000	302
101 - 250	28500	19782	35000	338
251 - 500	36000	29000	40000	466
OVER 500	31079	27700	36366	6116
GEOGRAPHIC REGION OF STORES				
MOUNTAIN & PACIFIC	31080	31000	42579	541
WEST SOUTH CENTRAL	38202	24000	38202	356
NORTH CENTRAL	35000	28500	36000	910
EAST COAST	30000	21439	43520	989
MULTIREGIONAL	36366	27700	36366	2780
CANADA	14485	14485	15000	1003
RETAIL AFFILIATION				
CHAIN	31070	25504	36366	7081
INDEPENDENT	23150	18500	35000	352

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 59B

TOTAL SIZE (IN SQUARE FEET) OF TYPICAL SUPERMARKET

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
PERCENT CHANGE IN RETAIL SALES IN ALL STORES 1986 VS. 1987			
ALL COMPANIES			
TOTAL	31000	25164 36366	7408
BOTTOM ALL STORE GROWTH	15000	14485 34364	1500
TOP ALL STORE GROWTH	30000	28500 50000	147
COMPANIES WITH 1 TO 5 STORES			
TOTAL	20000	14400 31500	242
BOTTOM ALL STORE GROWTH	16650	12500 20000	74
TOP ALL STORE GROWTH	28000	20000 60000	16
COMPANIES WITH 6+ STORES			
TOTAL	31054	25504 36366	7166
BOTTOM ALL STORE GROWTH	15000	14485 34364	1426
TOP ALL STORE GROWTH	30000	28500 50000	131

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1986 VS. 1987.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 60A
AVERAGE PRICE (IN DOLLARS) OF EACH ITEM CARRIED
BY A TYPICAL SUPERMARKET

	ALL STORES	RETAIL AFFIL.		1986 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE- PENDENT	UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501+
TOTAL	4672	4514	158	24	39	218	207	307	3877
PRICE OF ITEMS	1.38	1.38	1.35	1.37	1.36	1.16	1.40	1.27	1.40

TABLE 60B
AVERAGE PRICE (IN DOLLARS) OF EACH ITEM CARRIED
BY A TYPICAL SUPERMARKET

	ALL STORES	GEOGRAPHICAL REGION OF STORES				
		MOUNTAIN AND PACIFIC	WEST SOUTH CENTRAL	NORTH CENTRAL	EAST COAST	MULTI- REGIONAL
TOTAL	4672	539	194	678	615	1735
PRICE OF ITEMS	1.38	1.30	1.27	1.25	1.28	1.38

TABLE 61A
AVERAGE NUMBER OF ITEMS CARRIED
BY A TYPICAL SUPERMARKET

	ALL STORES	RETAIL AFFIL.		1986 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE- PENDENT	UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501+
TOTAL	6920	6631	289	58	102	302	279	340	5839
NUMBER OF ITEMS	24531	24757	18194	13668	17004	14239	20557	23193	25513

TABLE 61B
AVERAGE NUMBER OF ITEMS CARRIED
BY A TYPICAL SUPERMARKET

	ALL STORES	GEOGRAPHICAL REGION OF STORES				
		MOUNTAIN AND PACIFIC	WEST SOUTH CENTRAL	NORTH CENTRAL	EAST COAST	MULTI- REGIONAL
TOTAL	6920	557	352	934	803	2780
NUMBER OF ITEMS	24531	20062	29721	20787	27616	31515

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 62

**COMPANIES SCANNING IN 100% OF STORES
AND COMPANIES WITH PERSON RESPONSIBLE FOR SCANNING**

	GEOGRAPHICAL REGION OF STORES					
	ALL COMPANIES	MOUNTAIN AND PACIFIC	WEST SOUTH CENTRAL	NORTH CENTRAL	EAST COAST	MULTI- REGIONAL
TOTAL	231	32	14	78	84	3
WITH 100% SCANNING	7.8	6.3	7.1	11.5	7.1	
TOTAL	170	24	11	61	53	
HAVE PERSON FOR SCANNING	64.7	75.0	45.5	70.5	66.0	
DON'T HAVE PERSON	35.3	25.0	54.5	29.5	34.0	

TABLE 63

**CURRENT USES OF SCANNING POS DATA **
(PERCENTAGE OF COMPANIES)**

	GEOGRAPHICAL REGION OF STORES					
	ALL COMPANIES	MOUNTAIN AND PACIFIC	WEST SOUTH CENTRAL	NORTH CENTRAL	EAST COAST	MULTI- REGIONAL
TOTAL	171	24	11	62	53	3
CHECKER PERFORMANCE	92.4	95.8	90.9	91.9	92.5	
SPECIALS	86.0	83.3	81.8	79.0	92.5	
COUPON ACCOUNTING	74.3	87.5	63.6	71.0	73.6	
WORK SCHEDULING	58.5	75.0	63.6	51.6	58.5	
PRODUCE DEPARTMENT ANALYSIS	57.3	70.8	43.5	50.0	71.7	
MEAT DEPARTMENT ANALYSIS	54.4	54.2	27.3	58.1	66.0	
SHELF ALLOCATION	48.5	45.8	45.5	61.3	41.5	
NEW PRODUCT EVALUATION	45.6	54.2	45.5	50.0	35.8	
SHRINK ANALYSIS	30.4	29.2	45.5	29.0	28.3	
PRICE ELASTICITY	26.9	41.7	36.4	22.6	22.6	
REORDERING	15.2	16.7	18.2	17.7	11.3	
OTHER	5.8	4.2	18.2	-	11.3	

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INSTITUTE SPEAKS, 1988

RETAIL OPERATIONS

TABLE 64A
PERCENTAGE OF SALES ACCOUNTED FOR
BY GENERAL MERCHANDISE

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	3.9	3.0	6.2	126
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	2.0	1.8	4.0	36
10 - 30 MILLION	2.5	2.0	4.0	31
31 - 100 MILLION	2.5	1.6	4.5	16
101 - 250 MILLION	2.0	1.8	5.0	12
251 - 500 MILLION	3.7	3.5	5.4	9
OVER 500 MILLION	4.0	3.0	6.2	22
GEOGRAPHIC REGION OF STORES				
MOUNTAIN & PACIFIC	3.6	3.6	7.4	22
WEST SOUTH CENTRAL	6.2	6.2	7.6	10
NORTH CENTRAL	3.6	2.6	4.5	33
EAST COAST	2.2	2.2	3.0	48
MULTIREGIONAL				2
CANADA				3
RETAIL AFFILIATION				
CHAIN	3.8	3.0	6.2	46
INDEPENDENT	2.2	1.6	4.0	80

NOTE: DATA WEIGHTED BY 1987 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 64B
PERCENTAGE OF SALES ACCOUNTED FOR
BY GENERAL MERCHANDISE

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING	
PERCENT CHANGE IN RETAIL SALES IN ALL STORES 1986 VS. 1987				
ALL COMPANIES				
TOTAL	3.9	3.0	6.2	123
BOTTOM ALL STORE GROWTH	3.5	2.0	4.5	36
TOP ALL STORE GROWTH	1.6	1.6	3.0	7
COMPANIES WITH 1 TO 5 STORES				
TOTAL	2.5	1.9	5.0	68
BOTTOM ALL STORE GROWTH	2.0	2.0	4.5	23
TOP ALL STORE GROWTH	3.8	2.0	6.5	4
COMPANIES WITH 6+ STORES				
TOTAL	4.0	3.0	6.2	55
BOTTOM ALL STORE GROWTH	3.5	2.0	4.5	13
TOP ALL STORE GROWTH				3

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1986 VS. 1987.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY 1987 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 65A
PERCENTAGE OF SALES ACCOUNTED FOR
BY HEALTH AND BEAUTY AIDS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	4.6	3.5	7.0	137
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	3.0	2.0	4.0	41
10 - 30 MILLION	3.0	2.0	4.0	34
31 - 100	3.0	2.1	5.3	21
101 - 250	3.7	2.6	6.0	12
251 - 500	3.7	3.6	5.5	9
OVER 500	4.5	4.0	7.0	20
GEOGRAPHIC REGION OF STORES				
MOUNTAIN & PACIFIC	5.4	4.0	5.4	23
WEST SOUTH CENTRAL	9.9	6.5	9.9	11
NORTH CENTRAL	3.5	2.7	4.9	38
EAST COAST	5.7	2.0	8.9	52
MULTIREGIONAL				2
CANADA				3
RETAIL AFFILIATION				
CHAIN	4.4	3.5	7.0	44
INDEPENDENT	3.0	2.1	5.2	93

NOTE: DATA WEIGHTED BY 1987 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

TABLE 65B
PERCENTAGE OF SALES ACCOUNTED FOR
BY HEALTH AND BEAUTY AIDS

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING	
PERCENT CHANGE IN RETAIL SALES IN ALL STORES 1986 VS. 1987				
ALL COMPANIES				
TOTAL	4.6	3.5	7.0	133
BOTTOM ALL STORE GROWTH	2.7	1.0	3.7	41
TOP ALL STORE GROWTH	.8	.8	2.9	8
COMPANIES WITH 1 TO 5 STORES				
TOTAL	3.3	2.0	5.3	79
BOTTOM ALL STORE GROWTH	3.3	2.0	7.0	28
TOP ALL STORE GROWTH	3.3	4.7	5.3	5
COMPANIES WITH 6+ STORES				
TOTAL	4.7	3.5	7.0	54
BOTTOM ALL STORE GROWTH	2.7	1.0	3.7	13
TOP ALL STORE GROWTH				3

NOTE: DATA WEIGHTED BY 1987 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 66A
PERCENTAGE OF SALES ACCOUNTED FOR
BY TOBACCO

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	2.0	1.5	3.5	130
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	3.0	2.0	5.1	39
10 - 30 MILLION	2.8	1.0	4.3	30
31 - 100	4.2	2.0	5.0	19
101 - 250	2.6	1.7	4.1	13
251 - 500	3.5	2.2	5.5	10
OVER 500	1.9	1.5	3.5	19
GEOGRAPHIC REGION OF STORES				
MOUNTAIN & PACIFIC	1.9	1.2	2.0	18
WEST SOUTH CENTRAL	1.5	1.5	1.5	9
NORTH CENTRAL	3.0	2.5	3.7	39
EAST COAST	1.7	1.0	1.9	52
MULTIREGIONAL				1
CANADA				3
RETAIL AFFILIATION				
CHAIN	2.1	1.5	3.5	46
INDEPENDENT	2.7	1.7	4.8	84

NOTE: DATA WEIGHTED BY 1987 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 66B
PERCENTAGE OF SALES ACCOUNTED FOR
BY TOBACCO

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
PERCENT CHANGE IN RETAIL SALES IN ALL STORES 1986 VS. 1987			

ALL COMPANIES			

TOTAL	2.0	1.5 3.5	126
BOTTOM ALL STORE GROWTH	3.0	3.0 3.5	38
TOP ALL STORE GROWTH	1.0	1.0 1.0	8
COMPANIES WITH 1 TO 5 STORES			

TOTAL	2.9	1.7 4.3	71
BOTTOM ALL STORE GROWTH	2.4	1.0 5.0	26
TOP ALL STORE GROWTH	8.0	5.4 8.0	5
COMPANIES WITH 6+ STORES			

TOTAL	2.1	1.3 3.5	55
BOTTOM ALL STORE GROWTH	3.0	3.0 3.5	12
TOP ALL STORE GROWTH			3

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1986 VS. 1987.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY 1987 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 67A
PERCENTAGE OF SALES ACCOUNTED FOR
BY GM AND HABA COMBINED

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	8.0	7.1	9.0	131
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	4.5	3.9	7.0	33
10 - 30 MILLION	5.1	4.0	8.0	28
31 - 100 MILLION	7.0	4.8	8.0	20
101 - 250 MILLION	5.0	4.0	9.5	14
251 - 500 MILLION	9.7	7.0	11.1	10
OVER 500 MILLION	8.1	7.3	9.0	26
GEOGRAPHIC REGION OF STORES				
MOUNTAIN & PACIFIC	9.0	9.0	11.4	21
WEST SOUTH CENTRAL	16.1	14.1	16.1	9
NORTH CENTRAL	7.0	5.8	9.2	45
EAST COAST	7.9	5.0	11.1	43
MULTIREGIONAL				2
CANADA				1
RETAIL AFFILIATION				
CHAIN	7.9	7.9	9.0	53
INDEPENDENT	5.8	5.8	5.8	78

NOTE: DATA WEIGHTED BY 1987 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 67B
PERCENTAGE OF SALES ACCOUNTED FOR
BY GM AND HABA COMBINED

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING	
PERCENT CHANGE IN RETAIL SALES IN ALL STORES 1986 VS. 1987				
ALL COMPANIES				
TOTAL	8.0	7.2	9.0	126
BOTTOM ALL STORE GROWTH	6.0	5.8	8.7	40
TOP ALL STORE GROWTH	2.4	2.4	5.9	8
COMPANIES WITH 1 TO 5 STORES				
TOTAL	5.8	5.8	5.8	66
BOTTOM ALL STORE GROWTH	5.8	5.8	5.8	26
TOP ALL STORE GROWTH	8.0	5.0	9.1	5
COMPANIES WITH 6+ STORES				
TOTAL	8.1	7.9	9.2	60
BOTTOM ALL STORE GROWTH	7.2	6.0	10.0	14
TOP ALL STORE GROWTH				3

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1986 VS. 1987.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY 1987 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 68A
PERCENTAGE OF SALES ACCOUNTED FOR
BY GM INCLUDING TOBACCO BUT NOT INCLUDING HABA

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	6.2	4.1	7.7	77
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	5.5	4.0	7.2	20
10 - 30 MILLION	6.5	3.0	7.5	13
31 - 100 MILLION	6.0	5.0	8.7	9
101 - 250 MILLION	6.3	5.0	7.1	10
251 - 500 MILLION	10.0	4.3	11.7	8
OVER 500 MILLION	5.0	4.1	7.5	17
GEOGRAPHIC REGION OF STORES				
MOUNTAIN & PACIFIC	4.2	4.8	9.3	14
WEST SOUTH CENTRAL	7.7	7.7	8.7	8
NORTH CENTRAL	6.8	6.3	7.5	24
EAST COAST	4.1	3.9	4.1	24
CANADA				1
RETAIL AFFILIATION				
CHAIN	6.1	4.1	7.7	36
INDEPENDENT	6.9	5.0	7.1	41

NOTE: DATA WEIGHTED BY 1987 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 60B

PERCENTAGE OF SALES ACCOUNTED FOR
BY GM INCLUDING TOBACCO BUT NOT INCLUDING HABA

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
PERCENT CHANGE IN RETAIL SALES IN ALL STORES 1986 VS. 1987				
ALL COMPANIES				
TOTAL	6.2	4.1	7.7	76
BOTTOM ALL STORE GROWTH	6.4	5.0	7.5	26
TOP ALL STORE GROWTH				3
COMPANIES WITH 1 TO 5 STORES				
TOTAL	6.0	5.0	7.1	35
BOTTOM ALL STORE GROWTH	5.0	2.5	6.5	16
TOP ALL STORE GROWTH				2
COMPANIES WITH 6+ STORES				
TOTAL	6.3	4.1	7.7	41
BOTTOM ALL STORE GROWTH	6.4	5.0	7.5	10
TOP ALL STORE GROWTH				1

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1986 VS. 1987.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY 1987 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 69A
PERCENTAGE OF SALES ACCOUNTED FOR
BY GM/HABA AND TOBACCO

	MEDIAN	MIDDLE RANGE		PARTICIPATING
ALL COMPANIES	10.2	9.4	13.0	88
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	9.0	7.0	10.0	21
10 - 30 MILLION	8.9	7.4	11.7	18
31 - 100 MILLION	10.0	8.0	12.0	10
101 - 250 MILLION	8.8	8.0	13.0	13
251 - 500 MILLION	13.3	10.3	17.0	9
OVER 500 MILLION	10.3	9.4	13.0	17
GEOGRAPHIC REGION OF STORES				
MOUNTAIN & PACIFIC	10.1	10.2	13.3	17
WEST SOUTH CENTRAL	17.6	15.6	17.6	8
NORTH CENTRAL	10.3	10.0	12.4	27
EAST COAST	9.6	6.4	13.0	28
MULTIREGIONAL				0
CANADA				1
RETAIL AFFILIATION				
CHAIN	10.4	9.4	13.0	39
INDEPENDENT	9.8	8.0	12.8	49

NOTE: DATA WEIGHTED BY 1987 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 698
PERCENTAGE OF SALES ACCOUNTED FOR
BY GM/HABA AND TOBACCO

	MEDIAN	MIDDLE RANGE	PARTICIPATING
PERCENT CHANGE IN RETAIL SALES IN ALL STORES 1986 VS. 1987			
ALL COMPANIES			
TOTAL	10.2	9.0 13.0	87
BOTTOM ALL STORE GROWTH	10.2	6.0 12.4	26
TOP ALL STORE GROWTH			3
COMPANIES WITH 1 TO 5 STORES			
TOTAL	11.0	8.2 12.8	42
BOTTOM ALL STORE GROWTH	7.1	4.5 9.0	16
TOP ALL STORE GROWTH			2
COMPANIES WITH 6+ STORES			
TOTAL	10.3	9.4 13.0	45
BOTTOM ALL STORE GROWTH	10.1	6.0 12.4	10
TOP ALL STORE GROWTH			1

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1986 VS. 1987.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY 1987 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 70A
PROFILE BY STORE TYPE
--NUMBER OF STORES RESPONDING TO EACH ITEM

	CONVENTIONAL STORES	SUPER STORES	COMBINATION STORES	WAREHOUSE STORES
TYPICAL WEEKLY SALES	3067	1631	970	285
TYPICAL WEEKLY SALES/CHECKOUT	2361	849	321	190
TYPICAL SALE/ CUSTOMER TRANSACTION	3003	1599	926	283
SALES/LABOR HOUR	2459	825	434	212
TYPICAL WEEKLY SALES/SQUARE FOOT OF SELLING AREA	2989	1522	963	258
TYPICAL TOTAL SIZE/SQUARE FEET	3055	1540	959	286
TYPICAL RETAIL PRICE/ITEM	1924	793	329	176
TYPICAL NUMBER OF ITEMS CARRIED	2499	878	463	208

NOTE: UNWEIGHTED DATA

TABLE 70B
PROFILE BY STORE TYPE
--MEDIAN

	CONVENTIONAL STORES	SUPER STORES	COMBINATION STORES	WAREHOUSE STORES
TYPICAL WEEKLY SALES	131427	245986	341828	251073
TYPICAL WEEKLY SALES/CHECKOUT	21600	29657	29204	21607
TYPICAL SALE/ CUSTOMER TRANSACTION	14.34	17.17	17.95	18.77
SALES/LABOR HOUR	96.85	96.08	98.52	146.90
TYPICAL WEEKLY SALES/SQUARE FOOT OF SELLING AREA	9.06	9.06	8.44	8.24
TYPICAL TOTAL SIZE/SQUARE FEET	18720	37768	47558	40813
TYPICAL RETAIL PRICE/ITEM	1.33	1.37	1.46	1.38
TYPICAL NUMBER OF ITEMS CARRIED	11500	18000	23000	16765

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 71
SPECIALTY DEPARTMENTS AND
SERVICES OFFERED BY SUPERMARKETS

	ALL STORES	MOUNTAIN & PACIFIC	WEST SOUTH CENTRAL	NORTH CENTRAL	EAST COAST
TOTAL	7323	1075	1317	2127	2729
DELI WITH CARRY-OUT	63.6	55.2	46.5	61.4	81.5
FLORAL/PLANT SHOP	47.5	83.7	43.2	37.5	44.2
RESTAURANT	8.2	2.9	12.1	10.4	7.1
LUNCH COUNTER/SNACK BAR	7.4	14.0	16.9	3.5	3.0
BEER	65.5	88.7	62.9	59.1	62.3
WINE	51.6	85.3	29.5	49.7	51.6
SERVICE MEAT	28.1	27.3	22.3	38.0	23.5
LIQUOR	15.2	60.4	8.9	12.3	2.8
CATERING	10.1	8.6	4.2	23.7	3.3
SCRATCH AND/OR BAKE-OFF BAKERY	64.9	60.0	58.3	60.5	73.9
FRESH SEAFOOD	41.6	47.7	28.2	41.3	46.1
READING CENTER	39.3	57.0	34.6	38.6	33.7
PHARMACY	21.8	25.6	26.7	21.2	18.8
COSMETIC CENTER	16.0	24.5	27.6	9.9	11.8
COURTESY BOOTH	50.9	27.3	39.8	55.6	61.2
VIDEO RENTAL	25.8	28.6	26.7	25.0	24.1
PHOTOGRAPHIC SERVICE CENTER	24.5	37.9	23.5	23.8	20.4
NUTRITIONAL SHELF TAGS	14.6	22.3	20.3	15.2	8.6
SALAD BAR	13.3	13.1	8.7	9.6	18.4
DELIVERY SERVICE	8.5	1.3	1.0	25.9	1.6

NOTE: UNWEIGHTED DATA

TABLE 72
PERCENTAGE OF ADVERTISING DOLLARS SPENT
ON FOLLOWING METHODS

	ALL COMPANIES	RETAIL AFFIL.		1986 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDEPENDENT	UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501+
TOTAL	211	63	148	66	53	29	19	13	31
NEWSPAPER	53.5	50.1	55.1	58.3	51.8	53.4	51.3	57.9	47.7
TARGETED MAILER/FLYER	24.3	19.3	26.6	28.1	29.4	25.5	14.0	12.5	19.8
RADIO	7.7	8.4	7.4	7.4	8.0	6.5	7.7	8.9	8.4
IN-STORE COUPONS	6.9	9.1	5.8	3.2	6.1	8.1	13.5	7.8	9.5
TELEVISION	6.3	11.8	3.8	2.8	2.7	5.3	11.5	10.9	13.5
BILLBOARDS	1.1	1.1	1.1	0	1.8	1.1	1.8	2.0	.9

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1987

RETAIL OPERATIONS

TABLE 73
TYPICAL SUPERMARKET ADVERTISING COSTS
AS A PERCENT OF SALES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	1.3	1.0	1.7	237
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	1.4	1.0	1.7	71
10 - 30	1.2	1.0	1.6	61
31 - 100	1.2	.7	1.5	34
101 - 250	1.2	.7	2.6	22
251 - 500	1.1	1.0	1.4	14
OVER 500	1.1	.9	1.4	35
REGION - CHAIN STORES				
NORTHEAST	.9	.7	1.1	5
MIDDLE ATLANTIC	1.1	1.0	1.3	9
EAST NORTH CENTRAL	1.2	1.0	100.0	15
WEST NORTH CENTRAL	1.0	1.1	54.5	8
SOUTHEAST	1.1	.7	2.6	10
WEST SOUTH CENTRAL	1.5	1.0	2.3	9
MOUNTAIN	1.2	1.1	1.5	5
PACIFIC	.9	.8	1.4	7
CANADA	1.2	.8	1.7	6
REGION - INDEPENDENT STORES				
NORTHEAST	1.4	1.0	1.6	16
MIDDLE ATLANTIC	1.4	1.2	2.8	26
EAST NORTH CENTRAL	1.4	1.0	1.7	46
WEST NORTH CENTRAL	1.2	.7	1.3	12
SOUTHEAST	1.2	1.0	1.5	26
WEST SOUTH CENTRAL	1.5	.8	100.0	7
MOUNTAIN	1.0	.7	1.5	11
PACIFIC	1.0	.8	1.3	15
CANADA	1.9	1.2	51.3	4

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

RETAIL OPERATIONS

TABLE 74
COMPANIES SCANNING IN 100% OF STORES
AND COMPANIES WITH PERSON RESPONSIBLE FOR SCANNING

	ALL COMPANIES	RETAIL AFFIL.		1986 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE- PENDENT	UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501+
TOTAL	231	69	162	71	60	34	22	12	32
WITH 100% SCANNING	7.8	20.3	2.5	-	-	5.9	27.3	16.7	25.0
TOTAL	169	71	98	31	43	30	22	12	31
HAVE PERSON FOR SCANNING	65.1	59.2	69.4	80.6	72.1	56.7	54.5	58.3	58.1
DON'T HAVE PERSON	35.5	39.4	32.7	19.4	27.9	50.0	45.5	33.3	41.9

TABLE 75
CURRENT USES OF SCANNING POS DATA **
(PERCENTAGE OF COMPANIES)

	ALL COMPANIES	RETAIL AFFIL.		1986 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE- PENDENT	UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501+
TOTAL	171	69	102	31	46	31	20	12	31
CHECKER PERFORMANCE	92.4	85.5	97.1	96.8	97.8	83.9	85.0	91.7	93.5
SPECIALS	86.0	82.6	88.2	87.1	93.5	90.3	80.0	75.0	77.4
COUPON ACCOUNTING	74.3	71.0	76.5	80.6	76.1	71.0	75.0	75.0	67.7
WORK SCHEDULING	58.5	60.9	56.0	58.1	54.3	48.4	60.0	58.3	74.2
PRODUCE DEPARTMENT ANALYSIS	57.3	47.8	63.7	58.1	76.1	48.4	50.0	33.3	51.6
MEAT DEPARTMENT ANALYSIS	54.4	46.4	59.8	58.1	69.6	38.7	60.0	33.3	48.4
SHELF ALLOCATION	48.5	49.3	48.0	51.6	43.5	38.7	60.0	25.0	64.5
NEW PRODUCT EVALUATION	45.6	46.4	45.1	48.4	41.3	38.7	55.0	33.3	54.8
SHRINK ANALYSIS	30.4	30.4	30.4	32.3	34.8	19.4	15.0	16.7	48.4
PRICE ELASTICITY	26.9	29.0	25.5	29.0	26.1	22.6	20.0	25.0	35.5
REORDERING	15.2	13.0	16.7	12.9	13.0	25.8	5.0	8.3	19.4
OTHER	5.8	10.1	2.9	3.2	2.2	3.2	15.0	-	12.9

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INSTITUTE SPEAKS, 1988

STORE LEVEL TRAINING

TABLE 76
TYPES OF TRAINING METHODS USED: VIDEOS

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF EMPLOYEES		
		\$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	< 100	101-500	501 +
TOTAL	209	69	45	31	24	8	27	58	61	61
MANAGERS	67.0	56.5	62.2	80.6	62.5	75.0	88.9	51.7	63.9	85.2
CLERKS	70.8	66.7	71.1	64.5	58.3	87.5	96.3	60.3	67.2	80.3
CASHIERS	73.7	62.3	75.6	80.6	62.5	87.5	100.0	58.6	73.8	85.2
BAGGERS	66.5	58.0	68.9	64.5	62.5	75.0	88.9	50.0	68.9	77.0
PHARMACISTS	4.8	1.4	-	9.7	-	12.5	18.5	-	1.6	14.8

TABLE 77
TYPES OF TRAINING METHODS USED: SEMINARS

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF EMPLOYEES		
		\$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	< 100	101-500	501 +
TOTAL	209	69	45	31	24	8	27	58	61	61
MANAGERS	82.8	81.2	77.8	87.1	83.3	75.0	92.6	79.3	82.0	93.4
CLERKS	25.4	33.3	28.9	12.9	4.2	-	37.0	24.1	29.5	19.7
CASHIERS	31.6	37.7	35.6	19.4	20.8	25.0	37.0	32.8	34.4	26.2
BAGGERS	14.8	17.4	20.0	12.9	4.2	-	18.5	15.5	19.7	9.8
PHARMACISTS	8.6	1.4	-	12.9	12.5	12.5	29.6	-	3.3	19.7

TABLE 78
TYPES OF TRAINING METHODS USED: ON-THE-JOB

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF EMPLOYEES		
		\$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	< 100	101-500	501 +
TOTAL	209	69	45	31	24	8	27	58	61	61
MANAGERS	88.5	89.9	88.9	90.3	87.5	87.5	81.5	89.7	90.2	83.6
CLERKS	94.7	92.8	95.6	90.3	100.0	87.5	100.0	93.1	95.1	96.7
CASHIERS	95.7	92.8	97.8	93.5	100.0	100.0	96.3	94.8	98.4	93.4
BAGGERS	91.4	89.9	95.6	87.1	87.5	100.0	96.3	87.9	95.1	90.2
PHARMACISTS	15.8	4.3	4.4	19.4	8.3	50.0	55.6	1.7	6.6	34.6

NOTE: MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

STORE LEVEL TRAINING

TABLE 79

TYPES OF TRAINING METHODS USED: CERTIFICATION PROGRAMS

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF EMPLOYEES		
		\$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	< 100	101-500	501 +
TOTAL	209	69	45	31	24	8	27	58	61	61
MANAGERS	16.3	10.1	2.2	16.1	37.5	12.5	37.0	8.6	6.6	34.4
CLERKS	6.2	1.4	2.2	3.2	8.3	25.0	22.2	-	3.3	13.1
CASHIERS	12.4	5.8	6.7	9.7	25.0	25.0	29.6	1.7	8.2	29.5
BAGGERS	3.8	2.9	2.2	-	8.3	-	11.1	1.7	1.6	9.8
PHARMACISTS	5.7	-	-	6.5	12.5	12.5	22.2	-	1.6	14.8

TABLE 80

TYPES OF TRAINING METHODS USED: HOME STUDY

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF EMPLOYEES		
		\$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	< 100	101-500	501 +
TOTAL	209	69	45	31	24	8	27	58	61	61
MANAGERS	33.5	18.8	28.9	35.5	50.0	32.5	59.3	17.2	24.6	57.4
CLERKS	14.4	7.2	8.9	9.7	29.2	25.0	29.6	6.9	8.2	26.2
CASHIERS	12.4	7.2	8.9	12.9	20.8	12.5	22.2	8.6	6.6	19.7
BAGGERS	7.7	5.8	6.7	6.5	12.5	-	14.8	6.9	3.3	14.8
PHARMACISTS	3.3	1.4	-	-	4.2	12.5	14.8	-	-	9.8

NOTE: MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

STORE LEVEL TRAINING

TABLE 81

TYPICAL NUMBER OF TRAINING HOURS REQUIRED FOR NEW MANAGERS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	160	40	600	138
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	80	40	240	45
10 - 30	130	40	800	25
31 - 100	80	40	240	19
101 - 250	320	80	960	16
251 - 500	80	40	520	6
OVER 500	550	240	1040	24
NUMBER OF EMPLOYEES				
<100	40	23	200	35
101-500	100	40	960	34
501 +	300	60	640	47

TABLE 82

TYPICAL NUMBER OF TRAINING HOURS REQUIRED FOR NEW CLERKS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	20	10	40	172
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	20	10	40	56
10 - 30	20	10	40	37
31 - 100	20	10	24	23
101 - 250	30	16	70	23
251 - 500	24	8	24	7
OVER 500	20	12	28	23
NUMBER OF EMPLOYEES				
<100	19	8	40	46
101-500	20	10	40	45
501 +	20	12	40	56

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

STORE LEVEL TRAINING

TABLE 83

TYPICAL NUMBER OF TRAINING HOURS FOR NEW PHARMACISTS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	24	12	44	76
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	40	40	40	18
10 - 30	1	1	1	12
31 - 100	24	16	80	9
101 - 250	40	24	40	12
251 - 500	16	16	16	6
OVER 500	20	12	80	18
NUMBER OF EMPLOYEES				
<100	0	0	0	17
101-500	9	1	16	16
501 +	24	12	40	32

TABLE 84

TYPICAL NUMBER OF TRAINING HOURS FOR NEW CASHIERS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	20	16	30	185
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	24	12	40	61
10 - 30	20	12	40	37
31 - 100	20	16	30	26
101 - 250	20	16	24	23
251 - 500	24	19	24	8
OVER 500	22	16	30	26
NUMBER OF EMPLOYEES				
<100	24	12	36	50
101-500	20	16	40	49
501 +	20	17	30	59

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

STORE LEVEL TRAINING

TABLE 85

TYPICAL NUMBER OF TRAINING HOURS FOR NEW BAGGERS

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING	
ALL COMPANIES	8	4	15	177
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	8	5	20	56
10 - 30	10	3	20	37
31 - 100	10	4	15	25
101 - 250	8	5	12	21
251 - 500	4	3	16	8
OVER 500	6	4	8	26
NUMBER OF EMPLOYEES				
<100	9	4	20	45
101-500	10	4	20	49
501 +	8	4	12	57

TABLE 86

TYPICAL NUMBER OF TRAINING HOURS FOR EXPERIENCED MANAGERS

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING	
ALL COMPANIES	55	20	200	136
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	40	20	80	45
10 - 30	50	40	160	28
31 - 100	25	16	120	17
101 - 250	80	20	250	17
251 - 500	40	40	80	6
OVER 500	104	40	350	21
NUMBER OF EMPLOYEES				
<100	22	4	55	37
101-500	60	25	200	36
501 +	80	24	260	44

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

STORE LEVEL TRAINING

TABLE 87
TYPICAL NUMBER OF TRAINING HOURS FOR EXPERIENCED CLERKS

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
ALL COMPANIES	10	4 20	137
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)			
UNDER 10	10	4 25	41
10 - 30	14	4 23	34
31 - 100	8	6 16	17
101 - 250	10	4 20	18
251 - 500	24	10 24	4
OVER 500	8	3 16	21
NUMBER OF EMPLOYEES			
<100	9	4 25	34
101-500	16	8 20	42
501 +	11	4 20	40

TABLE 88
TYPICAL NUMBER OF TRAINING HOURS FOR EXPERIENCED PHARMACISTS

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
ALL COMPANIES	14	6 20	73
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)			
UNDER 10	8	8 8	19
10 - 30	0	0 0	11
31 - 100	16	2 120	9
101 - 250	20	20 20	10
251 - 500	16	16 16	6
OVER 500	12	3 48	17
NUMBER OF EMPLOYEES			
<100	0	0 0	17
101-500	9	2 16	16
501 +	14	8 80	28

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

STORE LEVEL TRAINING

TABLE 89

TYPICAL NUMBER OF TRAINING HOURS FOR EXPERIENCED CASHIERS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	12	5	20	144
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	15	8	25	48
10 - 30	12	4	20	34
31 - 100	14	7	18	17
101 - 250	7	3	16	17
251 - 500	17	7	24	5
OVER 500	16	6	24	21
NUMBER OF EMPLOYEES				
<100	12	5	25	41
101-500	15	8	20	42
501 +	14	4	22	40

TABLE 90

TYPICAL NUMBER OF TRAINING HOURS FOR EXPERIENCED BAGGERS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	4	2	8	134
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	5	2	10	43
10 - 30	5	2	12	33
31 - 100	4	1	8	17
101 - 250	3	0	8	15
251 - 500				3
OVER 500	4	2	8	21
NUMBER OF EMPLOYEES				
<100	5	2	10	34
101-500	5	2	8	42
501 +	4	2	8	38

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

STORE LEVEL TRAINING

TABLE 91
PROPOSED NEW TRAINING METHODS FOR 1988

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF EMPLOYEES		
		\$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	< 100	101-500	501 +
TOTAL	209	69	45	31	24	8	27	58	61	61
VIDEOS	59.8	69.6	64.4	51.6	54.2	75.0	40.7	65.5	67.2	41.0
SEMINARS	43.5	47.8	42.2	32.3	45.8	62.5	44.4	43.1	37.7	42.6
ON-THE-JOB TRAINING	40.2	44.9	49.4	38.7	29.2	50.0	29.6	44.8	44.3	32.8
CERTIFICATION PROGRAMS	27.8	18.8	35.6	22.6	41.7	25.0	33.3	15.5	29.5	34.4
TRAIN THE TRAINER	39.7	29.0	53.3	45.2	37.5	50.0	44.4	29.3	50.8	39.3
HOME STUDY	31.6	31.9	31.1	19.4	33.3	37.5	40.7	32.8	24.6	31.1
OTHER	4.3	1.4	4.4	9.7	8.3	12.5	-	1.7	4.9	3.3

TABLE 92
TRAINING TOPICS OFFERED MANAGERS

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF EMPLOYEES		
		\$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	< 100	101-500	501 +
TOTAL	209	69	45	31	24	8	27	58	61	61
OPERATIONS AND MANAGEMENT	85.2	79.7	77.8	96.8	91.7	87.5	96.3	75.9	85.2	95.1
SUPERVISORY SKILLS	85.2	81.2	82.2	93.5	95.8	75.0	85.2	82.8	83.6	93.4
FRONT END MANAGEMENT	82.3	79.7	84.4	80.6	91.7	87.5	77.8	79.3	83.6	90.2
LABOR SCHEDULING	80.9	72.5	82.2	96.8	83.3	62.5	85.2	69.0	88.5	86.9
LOSS PREVENTION	80.4	71.0	80.0	90.3	87.5	75.0	88.9	70.7	83.6	91.8
INVENTORY CONTROL	77.0	71.0	75.6	90.3	75.0	62.5	88.9	72.4	78.7	82.0
SANITATION	77.0	73.9	75.6	83.9	70.8	50.0	92.6	72.4	78.7	83.6
RECEIVING/STORAGE AT BACK DOOR	75.6	71.0	77.8	74.2	75.0	75.0	85.2	72.4	70.5	83.6
PRESENTATION OF PRODUCT	72.7	72.5	62.2	80.6	79.2	50.0	81.5	67.2	70.5	78.7
SAFETY	72.7	63.8	71.1	80.6	75.0	75.0	85.2	62.1	73.8	83.6
CARE OF PRODUCT	71.3	78.3	64.4	58.1	75.0	50.0	81.5	74.1	62.3	75.4
OTHER MERCHANDISING	65.6	60.9	53.3	77.4	87.5	37.5	77.8	56.9	63.9	78.7
SELLING SKILLS	60.3	65.2	60.0	64.5	58.3	37.5	51.9	63.8	62.3	54.1
CHOICE OF PRODUCT	57.9	59.4	48.9	64.5	70.8	37.5	55.6	58.6	52.5	60.7
OTHER	18.2	8.7	13.3	35.5	12.5	25.0	37.0	10.3	18.0	26.2

NOTE: MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

STORE LEVEL TRAINING

TABLE 93
TRAINING TOPICS OFFERED CLERKS

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF EMPLOYEES		
		\$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	< 100	101-500	501 +
TOTAL	209	69	45	31	24	8	27	38	61	61
CARE OF PRODUCT	73.2	75.4	66.7	67.7	75.0	75.0	81.5	72.4	65.6	77.0
SANITATION	72.7	75.4	57.8	80.6	75.0	62.5	81.5	74.1	67.2	80.3
SAFETY	71.3	68.1	62.2	80.6	66.7	87.5	81.5	65.5	70.5	78.7
LOSS PREVENTION	66.5	65.2	66.7	67.7	54.2	87.5	74.1	65.5	70.5	67.2
PRESENTATION OF PRODUCT	63.6	65.2	55.6	64.5	58.3	75.0	70.4	62.1	65.6	65.6
RECEIVING/STORAGE AT BACK DOOR	61.7	56.5	60.0	58.1	70.8	37.5	85.2	56.9	59.0	70.5
SELLING SKILLS	58.4	55.1	57.8	61.3	58.3	50.0	66.7	51.7	59.0	60.7
OTHER MERCHANDISING	41.6	46.4	37.8	41.9	29.2	37.5	51.9	44.8	41.0	39.3
INVENTORY CONTROL	31.1	40.6	22.4	22.6	25.0	12.5	48.1	36.2	24.6	32.8
CHOICE OF PRODUCT	24.9	30.4	17.8	19.4	20.8	25.0	29.6	31.0	14.8	27.9
FRONT END MANAGEMENT	19.1	23.2	17.8	9.7	16.7	25.0	18.5	22.4	16.4	14.8
OPERATIONS AND MANAGEMENT	14.8	15.9	15.6	6.5	12.5	12.5	18.5	17.2	13.1	14.8
OTHER	13.9	7.2	11.1	22.6	8.3	25.0	29.6	8.6	16.4	18.0
SUPERVISORY SKILLS	10.0	11.6	11.1	-	8.3	-	18.5	15.5	6.6	8.2
LABOR SCHEDULING	6.7	10.1	4.4	-	-	-	14.8	10.3	1.6	4.9

NOTE: MULTIPLE RESPONSES ALLOWED

TABLE 94
ORGANIZATION THAT ACTUALLY CONDUCTS MOST OF THE TRAINING SESSIONS

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF EMPLOYEES		
		\$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	< 100	101-500	501 +
TOTAL	205	68	45	31	22	8	27	57	60	60
COMPANY STAFF	82.9	77.9	80.0	80.6	86.4	100.0	92.6	77.2	80.0	90.0
WHOLESALE STAFF	7.8	14.7	6.7	6.5	-	-	3.7	15.8	8.3	1.7
NATIONAL ORGANIZATIONS	1.5	-	4.4	-	4.5	-	-	-	3.3	1.7
OUTSIDE CONSULTANTS	1.5	-	4.4	3.2	-	-	-	-	3.3	-
OTHER	6.3	7.4	4.4	9.7	9.1	-	3.7	7.0	5.0	6.7

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

STORE LEVEL TRAINING

TABLE 95

TYPICAL NUMBER OF PEOPLE ON COMPANY PAYROLL WHO ACTUALLY CONDUCT TRAINING ON A FULL-TIME BASIS

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
ALL COMPANIES	3	1 6	206
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)			
UNDER 10	3	2 5	68
10 - 30	2	1 6	45
31 - 100	1	1 24	31
101 - 250	2	1 5	23
251 - 500	3	3 5	7
OVER 500	4	1 7	27
NUMBER OF EMPLOYEES			
<100	2	1 4	57
101-500	2	1 6	61
501 +	3	1 7	60

TABLE 96

PERCENT OF JOB TIME ALLOCATED FOR TRAINING ON A FULL-TIME BASIS

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
ALL COMPANIES	6	10 100	193
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)			
UNDER 10	13	7 23	63
10 - 30	20	5 25	44
31 - 100	10	10 75	29
101 - 250	78	58 100	22
251 - 500	60	50 100	7
OVER 500	100	60 100	24
NUMBER OF EMPLOYEES			
<100	10	5 20	53
101-500	20	8 50	59
501 +	85	55 100	55

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

STORE LEVEL TRAINING

TABLE 97
TYPICAL NUMBER OF PEOPLE ON COMPANY PAYROLL WHO ACTUALLY
CONDUCT TRAINING ON A PART-TIME BASIS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	4	2	10	203
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	3	2	6	68
10 - 30	5	2	8	43
31 - 100	7	3	20	31
101 - 250	5	3	11	23
251 - 500	3	3	5	7
OVER 500	15	6	110	26
NUMBER OF EMPLOYEES				
<100	2	2	4	57
101-500	5	2	8	59
501 +	9	3	73	59

TABLE 98
PERCENT OF JOB TIME ALLOCATED FOR TRAINING ON A PART-TIME BASIS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	10	5	25	185
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	8	5	10	62
10 - 30	10	5	30	39
31 - 100	10	10	15	28
101 - 250	25	5	40	21
251 - 500	58	15	100	6
OVER 500	20	5	30	24
NUMBER OF EMPLOYEES				
<100	8	5	10	52
101-500	10	5	20	53
501 +	13	5	30	53

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

STORE LEVEL TRAINING

TABLE 99
FACILITY THAT IS GENERALLY USED FOR TRAINING

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF EMPLOYEES		
		\$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	< 100	101-500	501 +
TOTAL	198	64	43	31	22	8	26	55	58	60
MANAGER										
COMPANY FACILITY (i.e. TRAINING CENTER)	38.4	31.3	39.5	45.2	45.5	75.0	30.8	27.3	37.9	46.7
STORE AREA AWAY FROM SELLING AREA (i.e. BREAK-ROOM)	35.9	54.7	30.2	25.8	27.3	12.5	23.1	58.2	34.5	21.7
NON-COMPANY SETTING (i.e. HOTEL, COMMERCIAL CONFERENCE ROOM)	18.2	12.5	20.9	16.1	22.7	12.5	26.9	14.5	17.2	20.0
OTHER	7.6	1.6	9.3	12.9	4.5	-	19.2	-	10.3	11.7
CLERK										
COMPANY FACILITY (i.e. TRAINING CENTER)	25.8	26.6	27.9	32.3	18.2	62.5	11.5	23.6	29.3	21.7
STORE AREA	62.6	70.3	62.8	54.8	63.6	25.0	61.5	70.9	60.3	61.7
AWAYFROM SELLING AREA (i.e. BREAK ROOM)										
NON-COMPANY SETTING (i.e. HOTEL, COMMERCIAL CONFERENCE ROOM)	1.0	1.6	-	-	-	12.5	-	1.8	-	-
OTHER	10.6	1.6	9.3	12.9	18.2	-	26.9	3.6	10.3	16.7

WHOLESALE TRAINING

TABLE 100
AUDIENCES FOR TRAINING

	ALL COMPANIES -----
TOTAL	23
WHOLESALE STAFF AND RETAIL CUSTOMERS	91.3
RETAIL CUSTOMERS ONLY	
WHOLESALE STAFF ONLY	8.7
NONE	

TABLE 101
SCHEDULE OF REGULAR EDUCATIONAL PROGRAMS

	ALL COMPANIES -----
TOTAL	21
YES	66.7

ONE EVERY 2 MONTHS	7.1
QUARTERLY	21.4
VARIES	7.1
FIVE TO TEN TIMES A YEAR	14.3
FOURTEEN PROGRAMS FOR 1988	7.1
SIX TO EIGHT TIMES A YEAR	7.1
WEEKLY	7.1
NO	33.3

TABLE 102
PERCENTAGE OF COMPANIES THAT USE AN EDUCATIONAL CHECK OFF SYSTEM

	ALL COMPANIES -----
TOTAL	21
HAVE USED AN EDUCATIONAL CHECK OFF	38.1
HAVE NOT USED AN EDUCATIONAL CHECK OFF	57.1

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

WHOLESALE TRAINING

TABLE 103
PAYMENT METHOD FOR CHECK OFF SYSTEM

	ALL COMPANIES -----
TOTAL	8
A FIXED AMOUNT PER WEEK, MONTH, QUARTERLY, OR ANNUALLY	100.0
A PERCENTAGE OF SALES PER WEEK, MONTH OR ANNUALLY	
OTHER	

TABLE 104
**REQUIRED FEES IN ADDITION TO CHECK OFF SYSTEMS FOR
EDUCATIONAL PROGRAMS BY RETAILERS**

	ALL COMPANIES -----
TOTAL	21
RETAIL CUSTOMERS PAY AN ADDITIONAL FEE	57.1
RETAIL CUSTOMERS DO NOT PAY AN ADDITIONAL FEE	42.9

TABLE 105
TYPES OF TRAINING METHODS USED: HOME STUDY

	ALL COMPANIES -----
TOTAL	21
MANAGERS	47.6
CLERKS	28.6
PHARMACISTS	
CASHIERS	28.6
BAGGERS	28.6

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

WHOLESALE TRAINING

TABLE 106
TYPES OF TRAINING METHODS USED: VIDEOS

	ALL COMPANIES -----
TOTAL	21
MANAGERS	76.2
CLERKS	71.4
PHARMACISTS	4.8
CASHIERS	66.7
BAGGERS	61.9

TABLE 107
TYPES OF TRAINING METHODS USED: SEMINARS

	ALL COMPANIES -----
TOTAL	21
MANAGERS	100.0
CLERKS	52.4
PHARMACISTS	4.8
CASHIERS	47.6
BAGGERS	33.3

TABLE 108
TYPES OF TRAINING METHODS USED: ON-THE-JOB

	ALL COMPANIES -----
TOTAL	21
MANAGERS	47.6
CLERKS	57.1
PHARMACISTS	4.8
CASHIERS	52.4
BAGGERS	47.6

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

WHOLESALE TRAINING

TABLE 109

TYPES OF TRAINING METHODS USED: CERTIFICATION PROGRAMS

	ALL COMPANIES -----
TOTAL	21
MANAGERS	4.8
CLERKS	9.5
PHARMACISTS	4.8
CASHIERS	14.3
BAGGERS	

TABLE 110

TYPES OF TRAINING METHODS USED: TRAIN-THE-TRAINER

	ALL COMPANIES -----
TOTAL	21
MANAGERS	33.3
CLERKS	14.3
PHARMACISTS	4.8
CASHIERS	23.8
BAGGERS	14.3

TABLE 111

TOPICS COVERED DURING THE ANNUAL TRAINING CYCLE

	ALL COMPANIES -----
TOTAL	21
CHOICE OF PRODUCT	38.1
SELLING	66.7
SUPERVISORY SKILLS	85.7
SCHEDULING	47.6
CARE OF PRODUCT	52.4
FRONT END MANAGEMENT	61.9
INVENTORY	52.4
STORE OPERATIONS AND MANAGEMENT	85.7
PRESENTATION OF PRODUCT	61.9
BASIC RETAIL SKILLS	85.7
RECEIVING/STORAGE	61.9

NOTE: MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

WHOLESALE TRAINING

TABLE 112
TYPES OF TRAINING USED IN ADDITION TO REGULARLY SCHEDULED SEMINARS

	ALL COMPANIES -----
TOTAL	21
MANAGEMENT CONFERENCE/ OWNER OPERATOR	81.0
FOOD SHOWS	81.0
OTHER RETAILER RETREATS	47.6
NONE	
OTHER	33.3

NOTE: MULTIPLE RESPONSES ALLOWED

TABLE 113
TYPES OF TRAINING METHODS OFFERED WHOLESALE STAFF: VIDEOS

	ALL COMPANIES -----
TOTAL	23
TRUCK DRIVERS	47.8
SELECTORS	52.2
LOADERS	43.5
RETAIL COUNSELORS	52.2

TABLE 114
TYPES OF TRAINING METHODS OFFERED WHOLESALE STAFF: SEMINARS

	ALL COMPANIES -----
TOTAL	23
TRUCK DRIVERS	8.7
SELECTORS	8.7
LOADERS	8.7
RETAIL COUNSELORS	73.9

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

WHOLESALE TRAINING

TABLE 115

TYPES OF TRAINING METHODS OFFERED WHOLESale STAFF: ON-THE-JOB

	ALL COMPANIES -----
TOTAL	23
TRUCK DRIVERS	56.5
SELECTORS	82.6
LOADERS	78.3
RETAIL COUNSELORS	65.2

TABLE 116

TYPES OF TRAINING METHODS OFFERED WHOLESale STAFF:
CERTIFICATION PROGRAMS

	ALL COMPANIES -----
TOTAL	23
TRUCK DRIVERS	17.4
SELECTORS	8.7
LOADERS	4.3
RETAIL COUNSELORS	26.1

TABLE 117

TYPES OF TRAINING METHODS OFFERED WHOLESale STAFF: TRAIN-THE-TRAINER

	ALL COMPANIES -----
TOTAL	23
TRUCK DRIVERS	13.0
SELECTORS	8.7
LOADERS	8.7
RETAIL COUNSELORS	21.7

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

WHOLESALE TRAINING

TABLE 118
PRIMARY TRAINING LOCATION FOR RETAIL CUSTOMERS

	ALL COMPANIES -----
TOTAL	23
COMPANY FACILITY (i.e. TRAINING CENTER)	56.5
NON-COMPANY SETTING (i.e. HOTEL, COMMERCIAL CONFERENCE CENTER)	39.1
OTHER	

TABLE 119
ANTICIPATED SUBJECTS TO BE OFFERED TO WHOLESALE STAFF IN 1988
THAT WERE NOT OFFERED IN 1987

	ALL COMPANIES -----
TOTAL	23
INTERVIEWING/ HIRING	8.7
SELLING SKILLS/SALES	17.4
PERFORMANCE EVALUATION	21.7
COMMUNICATIONS	13.0
LEADERSHIP SKILLS	17.4
P.O.S. SUPPORT	4.3
M.B.O. MANAGEMENT	8.7
COMPUTERS	8.7
FINANCIAL ANALYSIS	4.3
TIME MANAGEMENT	4.3
ATTENDANCE	4.3
WAREHOUSE SUPERVISION	4.3
BUYER NEGOTIATION	8.7

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

WHOLESALE TRAINING

TABLE 120
NEW TEACHING METHODS TO BE OFFERED IN 1988

	ALL COMPANIES -----
TOTAL	23
IN-STORE CLASSES	39.1
VIDEOS	39.1
OUT-OF-STORE CLASSES	21.7
CONSULTANTS	30.4
OTHER*	8.7

NOTE: MULTIPLE RESPONSES ALLOWED

TABLE 121
ORGANIZATION THAT CONDUCTS MOST OF THE TRAINING SESSIONS

	ALL COMPANIES -----
TOTAL	23
NATIONAL NON-PROFIT ORGANIZATION	-
OUTSIDE CONSULTANTS	13.0
COMPANY STAFF	82.6
OTHER	-

TABLE 122
PRIMARY LOCATION FOR WHOLESALE STAFF TRAINING

	ALL COMPANIES -----
TOTAL	23
COMPANY FACILITY	56.5
NON-COMPANY FACILITY	43.5
IN-STORE IN THE SELLING AREA	-
IN-STORE AWAY FROM THE SELLING AREA	4.3

SOURCE: *FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

WHOLESALE TRAINING

TABLE 123

AMOUNT SPENT ON TRAINING FOR RETAILERS AND WHOLESALE STAFF

	ALL COMPANIES
TOTAL	23
RETAIL CUSTOMERS	47964
OWN WHOLESALE STAFF	100107
TOTAL EDUCATION EXPENSE BUDGET	234154

BUYER'S FUNCTION

TABLE 124

TYPICAL NUMBER OF FULL TIME BUYERS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	4	2	7	127
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	3	1	4	21
10 - 30	2	0	4	22
31 - 100	4	2	5	26
101 - 250	5	3	10	23
251 - 500	7	4	9	9
OVER 500	9	6	13	26
NUMBER OF STORES				
1-5	3	1	4	52
6-10	3	2	5	17
11-20	4	2	5	11
21 +	7	5	12	47

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

BUYER'S FUNCTION

TABLE 125
NUMBER OF ITEMS RESPONSIBLE BY EACH BUYER

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	2000	1300	2500	622
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	500	400	1500	28
10 - 30	1500	500	1500	14
31 - 100	2500	1500	3500	64
101 - 250	2000	700	3000	119
251 - 500	1800	1200	2676	52
OVER 500	2200	1500	2500	345
NUMBER OF STORES				
1-5	700	500	1500	93
6-10	3500	1500	10000	39
11-20	1700	1200	3000	54
21 +	2200	1500	2500	436

TABLE 126
PERCENTAGE OF TIME BUYERS SPEND

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	889	84	143	67	141	66	368	289	57	56	487
INTERVIEWING	14.2	3.0	4.9	18.2	22.5	13.8	15.7	9.0	15.3	18.7	16.4
PRICING PRODUCTS	7.6	11.6	7.0	8.0	7.8	4.5	7.5	8.2	7.2	4.7	7.7
RE-ORDERING	11.3	10.4	7.6	8.7	8.2	12.8	14.3	7.0	9.5	7.7	14.3
BUYING NEW ITEMS	9.0	5.9	6.3	8.2	9.2	11.2	10.4	6.3	6.6	9.3	10.8
CATEGORY REVIEW	6.3	4.3	6.0	6.0	7.0	6.3	6.7	6.0	7.0	5.4	6.6
REFRESHING WAREHOUSE	16.3	14.1	8.4	4.7	11.9	20.9	22.8	12.0	5.4	24.8	18.8
MERCHANDISING	13.3	16.6	18.8	12.0	14.8	12.8	10.5	17.5	10.5	12.7	11.4
ADVERTISING	10.5	13.6	17.8	23.3	9.5	8.4	5.5	15.6	15.5	12.5	6.9
OTHER	11.4	20.6	23.3	10.9	8.8	9.5	6.7	18.5	23.0	4.2	7.1

NOTE: WEIGHTED BY NUMBER OF BUYERS

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

BUYER'S FUNCTION

TABLE 127
REASONS BUYERS MEET WITH SALES REPRESENTATIVE

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	133	24	23	26	23	9	28	57	17	11	48
NEW ITEM INTRODUCTION	94.7	100.0	91.3	100.0	100.0	100.0	82.1	96.5	100.0	100.0	89.6
REGULAR PROMOTION CAMPAIGN	80.5	75.0	82.6	80.8	87.0	100.0	71.4	77.2	82.4	100.0	79.2
SPECIAL PROMOTIONAL CAMPAIGNS	94.0	95.8	87.0	96.2	95.7	100.0	92.9	91.2	94.1	100.0	95.8
PRICE CHANGES	43.6	41.7	47.8	38.5	43.5	22.2	53.6	40.4	29.4	45.5	52.1
OTHER	27.8	12.5	21.7	26.9	34.8	66.7	28.6	21.1	23.5	36.4	35.4

NOTE: MULTIPLE RESPONSES ACCEPTED

TABLE 128
ORGANIZATION OF THE BUYING FUNCTION

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	889	84	143	87	141	66	368	289	57	56	487
BY THE MANUFACTURER	28.1	11.9	6.3	26.4	37.6	19.7	38.6	9.3	31.6	5.4	41.5
BY THE PRODUCT	61.9	36.9	89.5	58.7	53.9	80.3	57.3	71.6	52.6	85.7	54.4
OTHER	9.0	51.2	1.4	9.2	8.5	-	4.1	17.6	15.8	-	4.1

NOTE: WEIGHTED BY NUMBER OF BUYERS

TABLE 129
BUYERS ARE TYPICALLY RESPONSIBLE FOR:

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	133	24	23	26	23	9	28	57	17	11	48
ONE DEPARTMENT	23.3	25.0	13.0	19.2	21.7	33.3	32.1	22.8	5.9	18.2	31.3
MANY DEPARTMENTS	71.4	66.7	73.9	76.9	73.9	66.7	67.9	66.7	88.2	81.8	68.8

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

TABLE 130

TYPICAL NUMBER OF ITEMS REVIEWED BY CATEGORY IN 1987

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	889	84	143	87	141	66	368	289	57	56	487
GROCERY	1762.1	1768.6	262.9	808.4	1883.5	1936.5	2035.8	1663.9	819.8	1163.4	1962.8
PRODUCE	57.9	35.1	5.7	27.2	71.1	75.4	66.3	31.0	118.0	23.7	66.6
REFRIGERATED/FROZEN	566.9	869.5	137.3	443.1	140.0	774.2	678.6	422.7	569.4	358.3	646.5
GM/HiBA	598.8	185.3	329.6	303.7	406.9	1462.9	665.5	474.2	186.6	54.0	753.1
ALL OTHERS	377.9	192.2	38.1	59.7	38.4	312.5	639.3	99.7	51.1	31.8	555.6
STORE TOTAL	2701.5	3020.6	764.7	1605.4	890.3	3580.8	3494.2	1690.5	1521.7	990.5	3404.6

NOTE: WEIGHTED BY NUMBER OF BUYERS

TABLE 131

TYPICAL PERCENTAGE OF NEW ITEMS THE COMPANY DECIDED TO STOCK

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	184	38	13	22	30	0	81	63	10	5	106
GROCERY	49.1	52.4	48.1	53.9	55.7		44.1	49.8	56.5	50.0	48.0
PRODUCE	5.8	8.9	5.4	7.2	3.2		4.9	8.1	3.0	5.0	4.7
REFRIGERATED/FROZEN	23.2	17.4	24.2	26.7	22.2		25.1	19.3	34.5	40.0	23.6
GM/HiBA	12.7	2.9	16.9	7.3	10.8		18.9	7.5	4.5	5.0	17.0
ALL OTHERS	9.2	18.4	5.4	5.0	8.2		7.0	15.3	1.5	0	6.7

NOTE: WEIGHTED BY NUMBER OF BUYERS

TABLE 132

PERCENTAGE OF COMPANIES THAT PLACE PRODUCTS IN SPECIAL AREAS

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	133	24	23	26	23	9	28	57	17	11	48
PLACE PRODUCTS IN SPECIAL AREAS	15.8	33.3	17.4	15.4	13.0	-	7.1	21.1	29.4	9.1	6.3
DO NOT PLACE PRODUCTS IN SPECIAL AREAS	82.0	66.7	82.6	76.9	87.0	100.0	89.3	78.9	70.6	81.8	89.6

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

BUYER'S FUNCTION

TABLE 133
MEMBERS OF THE BUYING COMMITTEE

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES				
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +	
TOTAL	131	24	22	25	23	9	28	56	17	10	48	
TOTAL USING A BUYING COMMITTEE	54.2	20.8	45.5	48.0	69.6	77.8	75.0	41.1	41.2	50.0	75.0	
BUYING EXECUTIVE	83.1	80.0	60.0	91.7	87.5	85.7	85.7	78.3	85.7	80.0	86.1	
MERCHANDISER	74.6	40.0	50.0	50.0	93.8	100.0	85.7	47.8	85.7	80.0	88.9	
CORPORATE EXECUTIVE	31.0	60.0	40.0	25.0	43.8	57.1	4.8	34.8	57.1	40.0	22.2	
STORE MANAGEMENT	32.4	80.0	80.0	25.0	37.5	-	9.5	69.6	28.6	40.0	8.3	
DISTRIBUTION EXECUTIVE	12.7	-	10.0	8.3	31.3	14.3	4.8	8.7	14.3	-	16.7	
OPERATIONS EXECUTIVE	32.4	-	30.0	58.3	50.0	14.3	19.0	30.4	71.4	40.0	25.0	
OTHER	15.5	-	-	-	25.0	-	33.3	-	-	40.0	25.0	
FREQUENCY OF BUYING COMMITTEE MEETINGS												
DAILY	4.2	-	20.0	-	-	-	4.8	8.7	-	-	2.8	
WEEKLY	78.9	80.0	40.0	83.3	81.3	100.0	85.7	69.6	71.4	60.0	88.9	
MONTHLY	12.7	-	30.0	16.7	18.8	-	4.8	17.4	14.3	40.0	5.6	
OTHER	4.2	20.0	10.0	-	-	-	4.8	4.3	14.3	-	2.8	
DO NOT USE A BUYING COMMITTEE	45.8	79.2	54.5	52.0	30.4	22.2	25.0	58.9	58.8	50.0	25.0	

NOTE: MULTIPLE RESPONSES ALLOWED

TABLE 134
METHODS BUYING COMMITTEES USE TO MAKE DECISION

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES				
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +	
TOTAL	126	22	22	24	21	9	28	53	17	9	47	
BUYING COMMITTEE VOTES	11.1	-	9.1	8.3	14.3	11.1	21.4	3.8	11.8	22.2	17.0	
COMMITTEE CONSENSUS	33.3	18.2	22.7	25.0	52.4	55.6	39.3	26.4	17.6	33.3	46.8	
ONE OR TWO PEOPLE ON THE COMMITTEE MAKE THE FINAL DECISION	21.4	22.7	18.2	33.3	9.5	11.1	25.0	24.5	29.4	-	19.1	
ONE PERSON MAKES FINAL DECISIONS	34.1	59.1	50.0	33.3	23.8	22.2	14.3	45.3	41.2	44.4	17.0	

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1983

BUYER'S FUNCTION

TABLE 135

AREA THAT HAS EXPERIENCED THE MOST NEW ITEM INTRODUCTIONS

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	123	23	20	25	20	9	26	51	16	10	46
GROCERY	62.6	82.6	45.0	56.0	65.0	55.6	65.4	70.6	43.8	50.0	63.0
PRODUCE											
GM/MeBA	5.7	4.3		8.0	5.0	22.2	3.8	2.0	6.3	10.0	8.7
REFRIGERATED/FROZEN	31.7	13.0	55.0	36.0	30.0	22.2	30.8	27.5	50.0	40.0	28.3
OTHER											

TABLE 136

INFORMATION COMPANY REGULARLY PRODUCES ABOUT ITEMS

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	133	24	23	26	23	9	28	57	17	11	48
ITEM MOVEMENT IN THE WAREHOUSE	60.2	37.5	34.8	34.6	78.3	100.0	96.4	36.8	41.2	54.5	95.8
ITEM MOVEMENT IN THE STORE	65.4	62.5	78.3	61.5	69.6	77.8	53.6	70.2	70.6	63.6	58.3
DIRECT PRODUCT PROFIT	9.0	4.2	8.7	7.7	4.3	11.1	17.9	5.3	5.9	9.1	14.6
DOLLAR CONTRIBUTION	36.8	16.7	26.1	56.5	43.5	33.3	57.1	28.1	29.4	45.5	47.9
GROSS MARGIN	72.2	50.0	56.5	69.2	87.0	88.9	89.3	57.9	58.8	90.9	89.6
SERVICE LEVELS OF WAREHOUSE TO STORES	40.6	12.5	4.3	23.1	56.5	66.7	89.3	12.3	29.4	36.4	79.2
DEAD PRODUCT REPORT	45.1	41.7	30.4	30.5	56.5	77.8	46.4	38.6	41.2	45.5	54.2
OTHER	3.8	8.3			4.3		7.1	5.3		9.1	2.1

NOTE: MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

TABLE 137

INFORMATION SOURCES USED TO MAKE NEW ITEM DECISIONS

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	133	24	23	26	23	9	28	57	17	11	48
SALES	82.0	75.0	73.9	84.6	87.0	77.8	89.3	77.2	82.4	81.8	87.5
WAREHOUSE TURNS	42.1	37.5	13.0	34.6	56.5	55.6	60.7	29.8	29.4	54.5	58.3
CUSTOMER SUGGESTIONS	75.9	83.3	87.0	65.4	69.6	77.8	75.0	86.0	82.4	54.5	66.7
STORE PERSONNEL	45.1	45.8	47.8	46.2	52.2	33.3	39.3	45.6	70.6	27.3	39.6
VENDOR INFORMATION	82.0	66.7	60.9	88.5	91.3	100.0	92.9	73.7	70.6	81.8	95.8
TRADE PRESS	40.6	50.0	43.5	30.8	34.8	66.7	35.7	47.4	35.3	18.2	39.6
MARKET RESEARCH STUDIES FOR YOUR COMPANY	21.8	12.5	4.3	15.4	26	33.3	42.9	12.3	17.6	9.1	37.5
FIRMS THAT TRACK PRODUCT MOVEMENT	30.1	12.5	21.7	19.2	34.8	44.4	53.6	17.5	23.5	27.3	47.9
OTHER	13.5			15.4	17.4	22.2	28.6	1.8	17.6	27.3	22.9

NOTE: MULTIPLE RESPONSES ALLOWED

TABLE 138

FREQUENCY IN WHICH COMPANIES EVALUATE PRODUCT MIX

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	133	24	23	26	23	9	28	57	17	11	48
WEEKLY	14.3	20.8	21.7	7.7	17.4	11.1	7.1	21.1	5.9	27.3	6.3
MONTHLY	19.5	20.8	13.0	26.9	21.7	11.1	17.9	19.3	17.6	18.2	20.8
TWICE A YEAR	12.0	12.5	13.0	15.4	4.3	11.1	14.3	7.0	35.3	9.1	10.4
THREE TIMES A YEAR	9.0	8.3	13.0	19.2	4.3	11.1		7.0	29.4	18.2	2.1
BASED ON NEW ITEM ACTIVITY	28.6	29.2	26.1	19.2	30.4	33.3	35.7	31.6	5.9	9.1	37.5
OTHER	13.5	4.2	13.0	3.8	21.7	11.1	25.0	10.5	5.9	9.1	20.8

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

BUYER'S FUNCTION

TABLE 139
RULES COMPANIES USE TO KEEP PRODUCTS

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	133	24	23	26	23	9	28	57	17	11	48
URNS/TIME PERIOD	88.0	79.2	78.3	88.5	91.3	100.0	96.4	82.5	82.4	81.8	97.9
CUSTOMER COMMENTS	52.6	58.3	60.9	42.3	65.2	66.7	35.7	57.9	64.7	72.7	37.5
STORE PERSONNEL COMMENTS	35.3	41.7	34.8	42.3	47.8	33.3	14.3	38.6	41.2	63.6	22.9
GROSS MARGIN	41.4	33.3	47.8	46.2	47.8	55.6	28.6	43.9	41.2	45.5	37.5
PRODUCT MIX	58.6	37.5	30.4	53.8	73.9	66.7	89.3	49.1	47.1	45.5	77.1
DOLLAR CONTRIBUTION	36.8	37.5	17.4	30.8	56.5	55.6	35.7	35.1	29.4	45.5	39.6
DPP	12.0	12.5	8.7	11.5	4.3	22.2	17.9	12.3	5.9	9.1	14.6
OTHER	2.3	4.2	-	3.8	4.3	-	-	3.5	-	9.1	-

NOTE: MULTIPLE RESPONSES ALLOWED

TABLE 140
**PERCENTAGE OF COMPANIES THAT USE SCANNING
INFORMATION TO KEEP OR DELETE A PRODUCT**

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	133	24	23	26	23	9	28	57	17	11	48
USE SCANNING INFORMATION TO KEEP OR DELETE A PRODUCT	38.3	29.2	30.4	42.3	43.5	55.6	39.3	36.8	35.3	45.5	39.6
DO NOT USE SCANNING INFORMATION TO KEEP OR DELETE A PRODUCT	60.2	70.8	65.2	53.8	56.5	44.4	60.7	61.4	64.7	45.5	60.4

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

TABLE 141
TYPES OF RESPONDENTS

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	148	36	21	21	21	12	37	63	15	13	57
RETAILER	94.6	100.0	95.2	100.0	90.5	75.0	94.6	98.4	100.0	84.6	91.2
WHOLESALE	5.4	-	4.8	-	9.5	25.0	5.4	1.6	-	15.4	8.8

TABLE 142
PERCENTAGE OF STORES THAT HAVE HVAC EQUIPMENT

	ALL STORES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	13272	46	68	204	593	2226	10135	117	117	189	12849
ROOF TOP UNITS	29.3	67.4	57.4	58.3	48.7	63.6	19.7	65.8	57.3	35.4	28.7
SPLIT SYSTEMS	48.6	63.0	41.2	35.8	51.1	15.6	55.9	42.7	60.7	43.4	48.6
DESSICANT DEHUMIDIFIERS	4	4.3	11.8	5	3	-	4	9.4	9	-	3
HUMID CLIMATE OR LOW DEWPOINT AC SYSTEM	11.7	8.7	5.9	16.7	5.2	7.8	12.9	9.4	17.9	16.9	11.6
OTHER	7	-	-	2.0	7	1.3	5	9	-	2.1	7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

TABLE 143

PERCENTAGE OF STORES THAT HAVE HEAT RECLAIM HEATING

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	90	59	95	11438
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	30	0	100	43
10 - 30	50	25	90	68
31 - 100	70	31	90	204
101 - 250	90	50	98	562
251 - 500	80	75	95	426
OVER 500	90	59	90	10135
NUMBER OF STORES				
1-5	50	33	100	114
6-10	85	50	90	117
11-20	55	29	90	189
21 +	90	59	95	11018

NOTE: WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

TABLE 144
METHODS USED TO CONTROL HEATING COSTS

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	148	36	21	21	21	12	37	63	15	13	57
INSTALLED HEAT RECLAMATION SYSTEMS TIED IN WITH REFRIGERATION COMPRESSORS											
NEW	70.3	19.4	57.1	76.2	100.0	100.0	97.3	41.3	73.3	84.6	98.2
RETROFIT	52.7	66.7	61.9	61.9	52.4	41.7	32.4	66.7	60.0	61.5	33.3
REDUCED STORE FRONT OR OTHER WINDOWS											
NEW	39.9	11.1	33.3	42.9	57.1	50.0	56.8	25.4	20.0	46.2	59.6
RETROFIT	75.0	75.0	66.7	85.7	76.2	75.0	73.0	74.6	80.0	84.6	71.9
LOWERED TEMPERATURES IN THE STORE AT CERTAIN TIMES OF DAY											
NEW	29.7	16.7	33.3	14.3	33.3	41.7	43.2	19.0	33.3	23.1	42.1
RETROFIT	56.8	58.3	42.9	71.4	66.7	66.7	45.9	60.3	73.3	46.2	50.9
CHANGED HEATING SYSTEMS											
NEW	11.5	8.3	9.5	9.5	4.8	8.3	21.6	9.5	6.7	-	17.5
RETROFIT	71.6	91.7	76.2	66.7	71.4	66.7	54.1	85.7	60.0	69.2	59.6
IMPROVED EFFICIENCY OF YOUR BOILER OR AUXILIARY HEAT SOURCE											
NEW	7.4	5.6	4.8	9.5	4.8	-	13.5	9.5	-	-	8.8
RETROFIT	84.5	91.7	85.7	85.7	76.2	100.0	75.7	88.9	86.7	76.9	80.7
REDUCED INFILTRATION LOSSES											
NEW	29.1	8.3	9.5	14.3	28.6	75.0	54.1	12.7	13.3	23.1	52.6
RETROFIT	62.8	69.4	66.7	81.0	57.1	41.7	54.1	66.7	73.3	69.2	54.4
OTHER	14.2	13.9	19.0	9.5	14.3	8.3	16.2	15.9	6.7	7.7	15.8
NONE OF THE ABOVE	2.7	8.3	-	4.8	-	-	-	4.8	6.7	-	-

NOTE: MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

TABLE 145

METHODS USED TO CONTROL AIR CONDITIONING COSTS

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	148	36	21	21	21	12	37	63	15	13	57
SHUT OFF COOLING SYSTEMS AT CERTAIN TIMES OF THE DAY											
NEW	21.6	8.3	14.3	23.8	28.6	25.0	32.4	11.1	13.3	38.5	31.6
RETROFIT	66.2	61.1	76.2	81.0	57.1	58.3	64.9	68.3	73.3	76.9	59.6
RAISED TEMPERATURES											
NEW	29.7	19.4	9.5	14.3	47.6	41.7	45.9	17.5	40.0	15.4	43.9
RETROFIT	48.6	50.0	61.9	52.4	47.6	25.0	45.9	54.0	40.0	53.8	43.9
MODERATED OUTSIDE AIR INTAKE											
NEW	25.7	2.8	4.8	19.0	38.1	41.7	51.4	6.3	26.7	38.5	43.9
RETROFIT	60.8	72.2	76.2	52.4	61.9	50.0	48.6	68.3	66.7	53.8	52.6
OTHER											
NEW	7.4	-	4.8	9.5	9.5	8.3	13.5	3.2	-	15.4	12.3
RETROFIT	86.5	80.6	90.5	90.5	90.5	83.3	86.5	84.1	80.0	100.0	87.7

NOTE: MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

TABLE 146
METHODS USED TO INCREASE INSULATION

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	148	36	21	21	21	12	37	63	15	13	57
ADDED INSULATION TO THE ROOF											
NEW	44.6	8.3	28.6	38.1	61.9	75.0	73.0	19.0	33.3	46.2	75.4
RETROFIT	56.8	55.6	66.7	38.1	52.4	50.0	67.6	54.0	46.7	61.5	61.4
ADDED INSULATION ABOVE THE CEILING											
NEW	13.5	8.3	4.8	19.0	28.6	16.7	10.8	14.3	6.7	7.7	15.8
RETROFIT	73.6	66.7	81.0	57.1	76.2	83.3	81.1	69.8	73.3	76.9	77.2
ADDED INSULATION INTO THE WALLS											
NEW	35.1	11.1	14.3	28.6	57.1	58.3	54.1	17.5	33.3	30.8	56.1
RETROFIT	73.0	72.2	61.9	71.4	81.0	83.3	73.0	66.7	73.3	84.6	77.2
ADDED INSULATION OVER THE BASEMENT											
NEW	1.4	-	-	-	-	-	5.4	-	-	-	3.5
RETROFIT	87.8	75.0	90.5	81.0	95.2	100.0	94.6	79.4	86.7	92.3	96.5
ADDED INSULATION UNDER FREEZER BOXES											
NEW	23.6	2.8	9.5	23.8	38.1	41.7	37.8	9.5	33.3	23.1	36.8
RETROFIT	79.7	72.2	85.7	81.0	85.7	91.7	75.7	76.2	73.3	92.3	82.5
OTHER											
NEW	2.0	2.8	-	4.8	-	-	2.7	1.6	-	7.7	1.8
RETROFIT	87.2	72.2	90.5	85.7	95.2	100.0	91.9	79.4	86.7	92.3	94.7

NOTE: MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

TABLE 147
PERCENTAGE OF STORES HAVE NIGHT SETBACK TEMPERATURE CONTROLS

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
ALL COMPANIES	146	36	21	21	19	12	37	63	14	13	56
MEAN	38.5	42.2	42.0	30.1	42.2	27.7	39.1	42.0	27.4	23.7	40.7

NOTE: UNWEIGHTED DATA

TABLE 148
PERCENTAGE OF STORES THAT HAVE TWO-SPEED OR VARIABLE SPEED AIR HANDL

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
ALL COMPANIES	138	33	20	20	18	10	37	58	14	13	53
MEAN	16.6	22.7	22.2	11.0	23.8	19.7	6.6	20.7	32.9	4.0	10.8

NOTE: UNWEIGHTED DATA

TABLE 149
TYPICAL ENERGY BILL FOR 1987

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING
ALL STORES	116000000	10412640 130000000	8127
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)			
UNDER 10	55000	39250 80000	28
10 - 30	175000	144000 450000	61
31 - 100	1000000	649088 1480000	135
101 - 250	6000000	1400000 36000000	474
251 - 500	5603820	3900000 8129091	377
OVER 500	116000000	17300000 200000000	7052
NUMBER OF STORES			
1-5	120000	60000 248235	81
6-10	708000	450000 1400000	102
11-20	1345641	1000000 1570000	134
21 +	116000000	12000000 130000000	7810

NOTE: WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

TABLE 150
TYPICAL KILOWATT HOURS PER SQUARE FOOT PER STORE

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING	
ALL STORES	55	5	58	7534
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	8	3	52	14
10 - 30	6	6	42	29
31 - 100	59	4	65	71
101 - 250	56	52	107	202
251 - 500	5	3	38	290
OVER 500	55	5	58	6928
NUMBER OF STORES				
1-5	49	4	65	46
6-10	19	4	52	62
11-20	56	54	61	86
21 +	55	5	58	7340

TABLE 151
TYPICAL COST PER KILOWATT HOUR PER STORE

	MEDIAN	MIDDLE RANGE	NUMBER PARTICIPATING	
ALL STORES	6	5	6	9127
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	6	6	12	18
10 - 30	5	4	8	29
31 - 100	5	5	6	87
101 - 250	8	6	8	445
251 - 500	6	6	7	312
OVER 500	6	5	6	8236
NUMBER OF STORES				
1-5	5	4	7	51
6-10	5	5	6	87
11-20	6	5	6	102
21 +	6	5	6	8887

NOTE: WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

ENERGY MANAGEMENT

TABLE 152

ENERGY CONTROLLERS INSTALLED AS STANDARD EQUIPMENT IN NEW STORES

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	148	36	21	21	21	12	37	63	15	13	57
DEFROST TIMER	58.8	63.9	66.7	76.2	61.9	50.0	40.5	66.7	66.7	76.9	43.9
HVAC CONTROL	62.8	25.0	66.7	71.4	90.5	58.3	78.4	39.7	86.7	76.9	78.9
LIGHTING CONTROL (TIME CLOCK)	54.1	19.4	57.1	52.4	76.2	58.3	73.0	34.9	73.3	53.8	70.2
DEMAND LIMITER OR LOAD CYCLER	21.6	19.4	33.3	23.8	33.3	16.7	10.8	28.6	26.7	7.7	15.8
REFRIGERATION ALARM SYSTEM	52.7	16.7	52.4	71.4	71.4	50.0	67.6	34.9	60.0	69.2	66.7
PRESSURE CONTROL (MAY INCLUDE TEMPERATURE)	62.2	47.2	38.1	71.4	71.4	75.0	75.7	42.9	60.0	84.6	78.9
REFRIGERATION TEMPERATURE CONTROL (EXCLUDING PRESSURE)	37.8	13.9	38.1	52.4	61.9	41.7	37.8	25.4	46.7	53.8	45.6
CONDENSER TEMPERATURE/ PRESSURE CONTROLLER	29.7	16.7	19.0	47.6	33.3	41.7	32.4	17.5	46.7	30.8	38.6
MEDIUM INTEGRATED CONTROLLER (COMBINES 2 OR 3 OF THE ABOVE FUNCTIONS)	15.5	5.6		23.8	9.5	33.3	27.0	6.3	6.7	23.1	26.3
LARGE INTEGRATED CONTROLLER (COMBINES 4 OR MORE OF THE ABOVE FUNCTIONS)	32.4	2.8	47.6	14.3	57.1	50.0	43.2	17.5	40.0	23.1	49.1
OTHER	4.7	2.8	4.8	4.8	14.3		2.7	4.8	13.3	7.7	1.8

NOTE: MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

ENERGY MANAGEMENT

TABLE 153
TOTAL SAVINGS DUE TO ENERGY CONTROLLERS BY THE USE OF THIS SYSTEM

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
	-----	-----	-----	-----
ALL COMPANIES	20000	7000	100000	50
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	2500	2000	14700	8
10 - 30	13000	6500	25000	6
31 - 100	34000	10000	60000	6
101 - 250	25000	8000	140000	7
251 - 500	30000	7500	475000	4
OVER 500	25000	8000	1000000	19
NUMBER OF STORES				
1-5	7950	2500	20000	14
6-10	27500	7500	54000	8
11-20				2
21 +	26000	8000	648000	26

NOTE: UNWEIGHTED DATA

TABLE 154
COST PER STORE TO MAINTAIN ELECTRONIC ENERGY CONTROLLERS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
	-----	-----	-----	-----
ALL STORES	500	500	1900	6252
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	500	200	4000	11
10 - 30	2000	500	3000	22
31 - 100	300	0	750	38
101 - 250	1800	1000	1800	348
251 - 500	390	100	1000	144
OVER 500	500	500	1900	5689
NUMBER OF STORES				
1-5	500	200	4500	28
6-10	500	500	1000	74
11-20	1500	1500	1500	65
21 +	500	500	1900	6085

NOTE: WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

TABLE 155
SAVINGS OF LOST PRODUCT DUE TO EARLY DETECTION
PER STORE BY ELECTRONIC ENERGY CONTROLLERS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	5000	3000	5000	2521
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	2500	1375	14000	8
10 - 30	3000	500	4000	23
31 - 100	1000	0	5000	60
101 - 250	3000	3000	3000	280
251 - 500	1000	1000	5000	107
OVER 500	5000	4000	5000	2043
NUMBER OF STORES				
1-5	5000	2500	6000	26
6-10	4000	500	5000	57
11-20	3000	1000	5000	75
21 +	5000	3000	5000	2363

NOTE: WEIGHTED BY NUMBER OF STORES

TABLE 156
METHODS USED TO EVALUATE SAVINGS FROM
ELECTRONIC ENERGY CONTROLLERS

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	148	36	21	21	21	12	37	63	15	13	57
COMPARE WITH OTHER STORES	36.5	5.6	42.9	33.3	47.6	50.0	54.1	19.0	53.3	23.1	54.4
PROJECT FIGURES	32.4	5.6	33.3	33.3	42.9	58.3	43.2	17.5	40.0	23.1	49.1
ON-OFF TESTING											

NOTE: MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

TABLE 157
TYPICAL PAYBACK PERIOD FOR THE ELECTRONIC ENERGY SYSTEMS - MONTHS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	24	21	30	7927
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	12	2	24	7
10 - 30	30	24	48	27
31 - 100	18	18	24	26
101 - 250	24	18	24	387
251 - 500	34	15	40	150
OVER 500	24	21	30	7330
NUMBER OF STORES				
1-5	24	16	36	33
6-10	18	18	48	48
11-20	18	11	30	46
21 +	24	21	30	7800

TABLE 158
TYPICAL PAYBACK PERIOD FOR THE ELECTRONIC ENERGY SYSTEMS - COST SAVINGS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	12000	6200	22000	1099
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	18000	800	18000	5
10 - 30	15000	10000	15000	10
31 - 100	10000	10000	26000	12
101 - 250	22000	22000	22000	224
251 - 500	10800	10800	10800	36
OVER 500	10000	6200	15000	812
NUMBER OF STORES				
1-5	18000	10000	26000	12
6-10	10000	5000	15000	24
11-20	92000	92000	92000	15
21 +	12000	6200	17000	1048

NOTE: WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

TABLE 159

PERCENTAGE OF STORES THAT USE TYPES OF REFRIGERATION SYSTEMS

	ALL STORES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	13197	36	65	195	540	2226	10135	93	108	189	12807
SINGLE CONVENTIONAL UNITS	50.0	72.1	57.1	61.6	31.1	79.0	44.3	58.3	43.2	51.2	50.0
EVEN PARALLELS	27.8	8.3	26.6	25.6	42.9	13.6	30.2	27.4	39.4	17.3	27.8
UNEVEN PARALLELS	20.9	9.3	7.4	14.9	20.0	7.4	24.2	9.2	18.8	24.3	21.0
OTHER	1	0	0	0	.9	0	.1	0	0	2.5	.1

TABLE 160

PERCENTAGE OF STORES THAT USE TYPES OF CONDENSING SYSTEMS

	ALL STORES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	13272	46	68	204	593	2226	10135	117	117	189	12849
AIR COOLED	81.3	82.2	71.9	79.8	84.4	94.1	78.4	85.0	91.6	81.2	81.2
WATER COOLED	8.6	6.0	18.3	6.6	3.6	2.8	10.2	9.8	3.8	12.0	8.6
OTHER	.3	0	0	0	.3	1.7	0	0	0	1.0	.3

NOTE: WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

TABLE 161
REFRIGERATED SYSTEMS INSTALLED FOR NEW STORES

	1987 SALES (IN MILLIONS OF DOLLARS)							NUMBER OF STORES			
	ALL COMPANIES	UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	148	36	21	21	21	12	37	63	15	13	57
OPEN DRIVE	5.4	-	9.5	4.8	9.5	-	8.1	1.6	6.7	7.7	8.8
EVEN PARALLELS	27.7	2.8	23.8	33.3	23.8	58.3	43.2	12.7	33.3	30.8	42.1
THERMOSTAT	25.7	5.6	23.8	38.1	33.3	50.0	27.0	14.3	46.7	30.8	31.6
WITH UNLOADERS	12.2	-	4.8	4.8	9.5	33.3	27.0	-	20.0	7.7	24.6
UNEVEN PARALLELS	46.6	8.3	14.3	47.6	71.4	50.0	86.5	14.3	46.7	53.8	80.7
SINGLE CONVENTIONAL UNIT	23.6	19.4	28.6	23.8	23.8	25.0	24.3	19.0	33.3	15.4	28.1
VARIABLE SPEED COMPRESSORS	8.8	5.6	9.5	4.8	14.3	8.3	10.8	6.3	13.3	-	12.3
LARGE ENERGY MANAGEMENT SYSTEM	30.4	5.6	33.3	14.3	52.4	25.0	51.4	12.7	46.7	30.8	45.6
MECHANICAL PRESSURE CONTROL	23.0	2.8	14.3	33.3	42.9	25.0	29.7	7.9	33.3	30.8	35.1
ELECTRONIC TEMPERATURE CONTROL	33.8	8.3	19.0	47.6	57.1	41.7	43.2	17.5	40.0	46.2	47.4
SMALL ELECTRONIC PRESSURE CONTROL (MAY INCLUDE TEMPERATURE)	29.1	5.6	4.8	42.9	28.6	41.7	54.1	6.3	40.0	38.5	49.1
OTHER	5.4	-	4.8	4.8	14.3	8.3	5.4	-	13.3	23.1	5.3

NOTE: MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

TABLE 162
PERCENTAGE OF STORES WITH MAIN LIGHTING SYSTEMS

	ALL STORES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	13272	46	68	204	593	2226	10135	117	117	189	12849
FLUORESCENT	90.8	91.6	94.1	84.8	81.6	89.2	92.0	89.3	74.8	77.0	91.2
HIGH INTENSITY DISCHARGE	8.6	2.4	3.1	7.2	12.7	10.8	7.9	6.5	20.8	16.7	8.4
OTHER	.1	0	0	0	.2	0	.1	0	0	.5	.1

TABLE 163
PERCENTAGE OF STORES WITH LIGHTING CONTROLS

	ALL STORES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	13272	46	68	204	593	2226	10135	117	117	189	12849
MECHANICAL/ ELECTRICAL TIME CLOCKS	54.4	72.9	70.2	87.4	57.1	86.1	45.4	69.0	63.9	75.0	53.9
ELECTRONIC TIME CONTROL	42.9	9.4	28.8	10.8	12.5	13.1	53.3	24.8	32.2	14.9	43.7
OTHER	.3	3.1	4.6	1.8	1.2	.8	0	1.1	2.7	1.9	.2

NOTE: WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

ENERGY MANAGEMENT

TABLE 164
TYPICAL STEPS TO CONTROL LIGHTING COSTS

	ALL COMPANIES	1987 SALES (IN MILLIONS OF DOLLARS)						NUMBER OF STORES			
		UNDER \$10	\$10-30	\$31-100	\$101-250	\$251-500	\$501 +	1-5	6-10	11-20	21 +
TOTAL	148	36	21	21	21	12	37	63	15	13	57
SWITCHED TO LOW ENERGY BULBS											
NEW	48.0	25.0	19.0	57.1	42.9	75.0	75.7	25.4	40.0	76.9	68.4
RETROFIT	72.3	58.3	61.9	61.9	90.5	75.0	86.5	57.1	80.0	61.5	89.5
ELECTRONIC BALLASTS											
NEW	7.4	2.8	-	9.5	19.0	8.3	8.1	3.2	13.3	15.4	8.8
RETROFIT	11.5	11.1	23.8	9.5	14.3	8.3	5.4	17.5	20.0	-	5.3
REMOVED UNNECESSARY LAMPS											
NEW	6.8	5.6	4.8	9.5	-	8.3	10.8	6.3	6.7	-	8.8
RETROFIT	33.8	19.4	33.3	38.1	38.1	50.0	37.8	25.4	40.0	30.8	42.1
SPECULAR SILVER REFLECTORS											
NEW	3.4	2.8	-	-	4.8	8.3	5.4	1.6	-	7.7	5.3
RETROFIT	10.1	5.6	4.8	9.5	9.5	16.7	16.2	9.5	-	-	15.8
LOWERED LIGHT LEVELS											
NEW	16.2	-	4.8	9.5	23.8	16.7	37.8	1.6	6.7	15.4	35.1
RETROFIT	23.6	11.1	9.5	23.8	28.6	25.0	40.5	12.7	20.0	23.1	36.8
BALLAST ENHANCEMENT DEVICES											
NEW	1.4	-	-	4.8	-	8.3	-	-	-	7.7	1.8
RETROFIT	13.5	11.1	14.3	14.3	4.8	25.0	16.2	11.1	20.0	7.7	15.8
NONE OF THE ABOVE	7.4	11.1	14.3	9.5	4.8	-	2.7	11.1	20.0	-	1.8
OTHER	7.4	2.8	9.5	4.8	4.8	8.3	13.5	3.2	13.3	7.7	10.5

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1988

HISTORICAL FACTS

TABLE 165

CONSUMER PRICE INDEX*

Annual Average

	ALL ITEMS		FOOD AT HOME		FOOD AWAY FROM HOME	
	C.P.I.	Percent Change	C.P.I.	Percent Change	C.P.I.	Percent Change
1987	340.4	3.7%	318.5	4.3%	374.4	4.0%
1986	328.4	1.9	305.3	2.9	360.1	3.9
1985	322.2	3.6	296.8	1.4	346.6	4.0
1984	311.1	4.3	292.6	3.7	333.4	4.2
1983	298.4	3.2	282.2	1.1	319.9	4.4
1982	289.1	6.1	279.2	3.4	306.5	5.3
1981	272.4	10.4	269.9	7.3	291.0	9.0
1980	246.8	13.5	251.5	8.0	267.0	9.9
1979	217.4	11.3	232.9	10.8	242.9	11.2
1978	195.4	7.7	210.2	10.5	218.4	9.0

* 1967 = 100

Source: Consumer Price Index
Detailed Report for December
U.S. Department of Labor
Bureau of Labor Statistics

TABLE 166

HISTORICAL DATA

Average Percent Change in Retail Sales		Average Percent Change in Retail Sales-Identical Stores		Average Weekly Store Sales	
1986 vs. 1987	5.5%	1986 vs. 1987	4.0%	1987	\$184,210
1985 vs. 1986	5.5	1985 vs. 1986	4.3	1986	171,936
1984 vs. 1985	5.0	1984 vs. 1985	3.6	1985	164,408
1983 vs. 1984	7.3	1983 vs. 1984	5.6	1984	140,016
1982 vs. 1983	7.6	1982 vs. 1983	6.1	1983	122,265
1981 vs. 1982	8.7	1981 vs. 1982	7.7	1982	143,678
1980 vs. 1981	9.3	1980 vs. 1981	8.1	1981	126,564
1979 vs. 1980	14.1	1979 vs. 1980	11.4	1980	110,000
1978 vs. 1979	15.0	1978 vs. 1979	11.7	1979	110,000

Average Weekly Sales Per Square Foot		Average Sales Per Transaction		Average Number of Items in a Supermarket	
1987	\$8.80	1987	\$16.30	1987	24,531
1986	7.88	1986	16.04	1986	19,857
1985	8.43	1985	16.33	1985	17,459
1984	8.00	1984	15.36	1984	15,379
1983	6.95	1983	14.60	1983	16,719
1982	7.90	1982	14.33	1982	13,067
1981	6.75	1981	14.23	1981	12,877
1980	6.94	1980	12.10	1980	14,145
1979	6.49	1979	11.60	1979	12,745

TABLE 167

OPERATING RESULTS

(Current & Historical)

	1979	1980	1981	1982	1983	1984	1985	1986	1987
Profit									
Gross Profit with Warehouse	22.3%	22.4%	23.0%	23.4%	23.7%	24.1%	24.0%	23.6%	23.9%
Gross Profit without Warehouse	20.5	20.9	20.9	21.2	21.5	21.6	22.3	21.3	22.6
Net Profit (before taxes)	1.9	1.5	1.4	1.5	1.0	1.6	1.8	1.7	1.6
Expenses									
Store Labor	8.3	8.4	8.5	8.8	8.8	8.9	8.6	8.8	8.6
Fringe Benefits	1.8	1.9	2.0	2.1	2.2	2.3	2.3	2.2	2.5

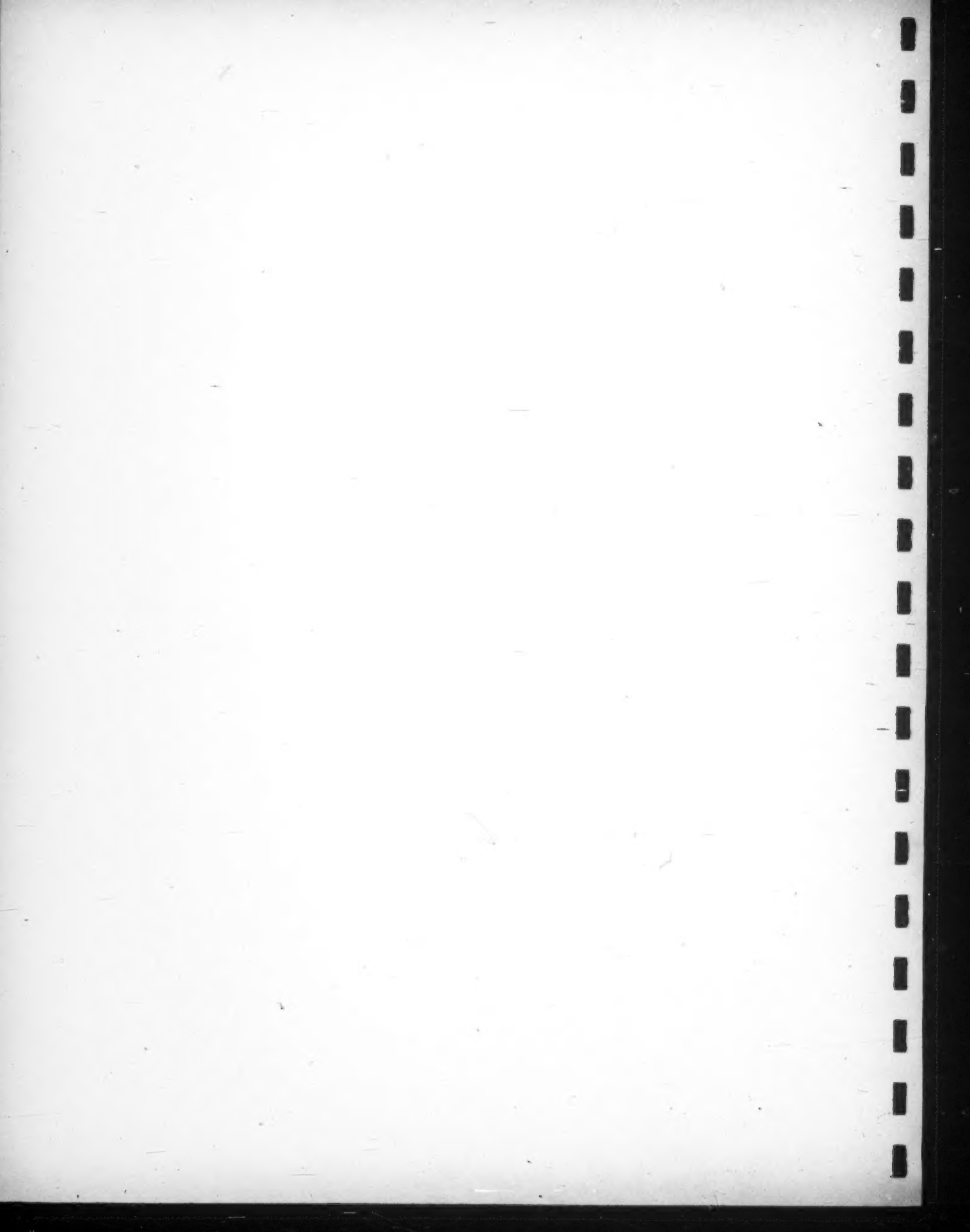
Source: Operations Review 1979-1987

TABLE 168

**PERCENT OF DISPOSABLE INCOME
SPENT ON FOOD**

	All Food	Food at Home	Food Away from Home
1987	14.3%	9.6%	4.7%
1986	14.5	9.9	4.6
1985	14.7	10.1	4.6
1984	14.8	10.2	4.6
1983	15.2	10.6	4.6
1982	15.5	11.0	4.5
1981	15.4	10.9	4.5
1980	15.8	11.2	4.6
1979	16.0	11.2	4.6
1978	15.8	11.4	4.5
1977	16.1	11.7	4.4

Source: U.S. Department of Agriculture
Economics, Statistics & Cooperatives Service



Definitions

Chain	Retailers with eleven (11) or more supermarkets.
Delivery Cost	The total amount of delivery expense charged to the retail store operation, including salaries, fringe benefits including payroll taxes, equipment depreciation and rental, taxes and licenses, insurance, repairs, gas and oil, and operating supplies.
Fringe Benefits	The company's share of payroll taxes (including those payable under the Federal Insurance Contribution Act, state and federal unemployment compensation, Workers' Compensation), holiday and vacation pay, group insurance, pension, profit sharing, retirement, severance pay, and bonus unless it is a significant amount paid on a regular, recurring basis.
Identical Stores	Supermarkets in operation throughout the entire two-year period, 1986 and 1987.
Independent	Retailers with ten (10) or fewer supermarkets.
Scratch Rate	Percentage of items ordered from the distribution center but not shipped to the store.
Selling Area	Customer area of the store.
Shortage (Shrink)	Computed using the "retail method," it includes all inventory shortages, including disappearance, spoilage and damaged merchandise for which there is no supplier reimbursement. Shrink is reported at retail value as a percent of sales.
Store Door Margin	Gross profit after any wholesaler's fees minus warehouse, delivery, and headquarter's cost are deducted.
Store Labor Expense	The payment to all store personnel including the store manager, for straight and overtime wages and regular recurring bonus payments. Payments for sickness, absence, excused time off, training and commissions are included in this figure.
Store Rent and Real Estate	Rent paid for store building and parking lot, real estate taxes and insurance and amortization of lease-hold improvement.
Store Supplies	The expense incurred for checkout, wrapping and prepackaging supplies and maintenance supplies for cleaning, window washing, etc.
Supermarket	A retail food store with annual sales of at least \$2 million a year. Conventional Supermarkets (under 30,000 total sq. ft.). Super Stores (over 30,000 total sq. ft., expanded food and non-food selection). Combination Stores (over 30,000 total sq. ft. and at least 25% of area in General Merchandise).

Limited Assortment Stores (carries less than 1000 items and offers few if any perishables with a "no frills" shopping environment).

Warehouse Stores (uses utilitarian fixtures and emphasizes lowered prices at the expense of customer service).

Utilities Expense

The cost for heating, light, water and power.

Warehouse Cost

The total amount of warehouse expense charged to the retail store operation, including such items as salaries, fringe benefits, warehouse rental, equipment rental or depreciation, utility cost and supplies.

Wholesaler

A company which reported wholesale sales in 1984 to supermarkets, institutions and/or businesses other than those owned by the company and primarily engaged in selling a general line of food and related products to food stores.

A. Cooperative:

(Independent) – Retailers who are stockholder members of cooperative wholesale buying groups.

B. Voluntary:

(Independent) – Retailers who belong to voluntary merchandising groups sponsored by wholesalers and who operate under a common name.

C. Unaffiliated:

(Independent) – Retailers who are not affiliated with either wholesale, cooperative or voluntary merchandising groups sponsored by wholesalers.

Region

The geographic area in which the company headquarters is located. Listed below are the states which fall into each region.

Northeast

Connecticut
Maine
Massachusetts
New Hampshire
Rhode Island
Vermont

West North Central

Iowa
Kansas
Minnesota
Missouri
Nebraska
North Dakota
South Dakota

West South Central

Arkansas
Louisiana
Oklahoma
Texas

Southeast

Alabama
Delaware
District of Columbia
Florida
Georgia
Kentucky
Maryland
Mississippi
North Carolina
Puerto Rico
South Carolina
Tennessee
Virginia
West Virginia

Mountain

Arizona
Colorado
Idaho
Montana
Nevada
New Mexico
Utah
Wyoming

Middle Atlantic

New Jersey
New York
Pennsylvania

Pacific

Alaska
California
Hawaii
Oregon
Washington

East North Central

Illinois
Indiana
Michigan
Ohio
Wisconsin

Canada

QUESTIONNAIRES

**FOLLOWING ARE SAMPLES
OF THE SURVEY FORMS USED
TO COLLECT DATA FOR
THE 1988 REPORT**

FMI RETAIL OPERATIONS QUESTIONNAIRE 1988

This questionnaire is part of FMI's annual industry study. It is designed to track trends and developments in the supermarket retail operations. We encourage your participation so that the results may be as representative of the industry as possible. All data will be held in strictest confidence. Please answer as many questions as possible. If you have any questions, please call the Research Department of FMI - (202)429-8279.

A. GENERAL OPERATIONS

1. What were your retail supermarket sales in (if 1987 figures are not yet available, please give an estimate):

a. 1986 \$ _____ million

b. 1987 \$ _____ million

2. What were your sales for "identical stores" (those supermarkets which you had in operation throughout the entire two-year period, 1986 and 1987) for:

a. 1986 \$ _____ million

b. 1987 \$ _____ million

3. What percent of your operation is supplied by the following:

a. own warehouse	_____	%
b. voluntary wholesaler	_____	%
c. cooperative wholesaler	_____	%
d. unaffiliated wholesaler	_____	%
e. direct vendor deliveries	_____	%
TOTAL	100.0	%

4. What percentage of your total supermarket sales in 1987 is accounted for by:

a. General Merchandise	_____	%
b. Health and Beauty Aids	_____	%
c. Tobacco	_____	%
d. GM/HaBA combined	_____	%
e. GM including tobacco but not including HaBA	_____	%
f. GM/HaBA and Tobacco	_____	%

5. Please provide total company data for the following items:

- a. What were your average weekly sales per supermarket in 1987? \$ _____
- b. What were your average weekly sales per checkout in 1987? \$ _____
- c. What was the average sale per customer transaction for your supermarkets in 1987? \$ _____
- d. What were your sales per labor hour for store employees in 1987? \$ _____
- e. What were your average weekly sales per square foot of selling area in 1987 (divide average weekly sales for all your supermarkets in operation the entire year by the number of square feet of selling area - customer area - in those stores)? \$ _____
- f. What is the total size, in square feet, of your typical store? _____
(square feet)
- g. What is the average retail price per item for all items sold in your supermarket during 1987? \$ _____
- h. On average, how many different items does your typical supermarket carry (count each brand, size, flavor, variety, type of meat cut, etc., as a separate item)? _____
number of items

5. Please complete the following chart for each type of store you operate. If you do not operate a particular store type, enter NA. Even though your company's definitions of store type may differ from the definitions that follow, we ask that you use the formats as defined here. This will help keep the store type data consistent for industrywide information.

	Conventional Supermarkets (30,000 and under total sq. ft.)	Super Stores (over 30,000 total sq. ft., expanded food and non-food selection)	Combination Stores (over 30,000 total sq. ft., and at least 25% of area in general merchandise)	Warehouse Stores (uses utilitarian fixtures and emphasizes lowered prices at expense of cust. serv.)
Number of Each Type of Store	_____	_____	_____	_____
Average Weekly Sales per Store	\$ _____	\$ _____	\$ _____	\$ _____
Average Weekly Sales per Checkout	\$ _____	\$ _____	\$ _____	\$ _____
Average Sales per Customer Transaction	\$ _____	\$ _____	\$ _____	\$ _____
Sales per Labor Hour	\$ _____	\$ _____	\$ _____	\$ _____
Average Weekly Sales per Sq. Ft. of Selling Area	\$ _____	\$ _____	\$ _____	\$ _____
Average Total Size in Sq. Ft.	_____	_____	_____	_____
Average Retail Price per Item	\$ _____	\$ _____	\$ _____	\$ _____
Average Number of Items Carried	_____	_____	_____	_____

B. CUSTOMER SERVICES



6. For each geographic region in which your company operates in how many supermarkets are you offering the following services? (If you are not sure of the regional breakout, just answer for Total No. of Stores):

	Total No. of Stores	1- Mountain & Pacific	2- West South Central	3- North Central	4- East Coast
NUMBER OF STORES IN EACH REGION					
a. deli offering carry-out items					
b. restaurant					
c. lunch counter/snack bar					
d. floral/plant shop					
e. liquor					
f. wine					
g. beer					
h. catering					
i. service meat					
j. fresh seafood					
k. pharmacy					
l. scratch and/or bake-off bakery					
m. reading center					
n. cosmetic center					
o. photographic service center					
p. salad bar					
q. courtesy booth					
r. video rental					
s. home delivery services					
t. nutritional shelf tags					

C. MERCHANDISING

7. What percentage of your total sales was spent on supermarket advertising (net of co-op revenue) %

8. What percent of your advertising budget was spent on:

	In-store coupons	_____ %
	Newspaper ads	_____ %
	Billboards	_____ %
	Radio ads	_____ %
	Television ads	_____ %
	Mail/flyer	_____ %
		<u>100.0%</u>

9. HOW MANY of your supermarkets accept credit cards for:

Grocery items _____ supermarkets

Pharmaceutical items and/or non-foods _____ supermarkets

D. SCANNING

Please check here if you do not have any scanners /_/ and return this to FMI.

10. In how many stores are you now scanning? _____ supermarkets

11. In which of the following ways are you currently using your scanning POS data (Please circle yes or no):

	YES	NO		YES	NO
a. checker performance	1	2	g. meat department analysis	1	2
b. coupon accounting	1	2	h. produce department analysis	1	2
c. specials	1	2	i. new product evaluation	1	2
d. work scheduling	1	2	j. price elasticity	1	2
e. shrink analysis	1	2	k. reordering	1	2
f. shelf allocation	1	2	l. other, please specify _____	1	2

12. Do you have someone specifically responsible for the analysis of scanning data? YES NO

FMI DISTRIBUTION CENTER OPERATIONS QUESTIONNAIRE 1988

This questionnaire is part of FMI's annual industry study and is designed to provide descriptive and comparative information for this important segment of the food industry. Only with your participation and expertise can concise and representative data be developed. All information will be held in strictest confidence.

If you have any questions, please call the research department of FMI - (202)429-8279.

A. GENERAL OPERATIONS

1. Based on the majority of sales,
is your company primarily a: (CIRCLE ONLY ONE)

- a. retailer 1
b. cooperative wholesaler 2
c. voluntary wholesaler 3
d. affiliated wholesaler 4

2. What were your company sales in (if 1987 figures are not yet available, please give an estimate):

- a. 1986 \$ _____ million
b. 1987 \$ _____ million

3. How many supermarkets does your operation serve/own (a supermarket is a retail food store with annual sales of at least two million dollars)?

- a. own _____ stores
b. serve as a wholesaler _____ stores

4. What percentage of your total annual shipping volume in dollars is attributed to:

- a. company owned stores %
b. independent food stores %
c. other food chains (11 + stores) %
d. convenience stores %
e. food service/institutional service %
f. other, please specify _____ %
TOTAL 1 0 0. 0 %

B. WHOLESALE OPERATIONS

If you are a wholesaler, please answer number 5.

5. Does your company provide any of the following services to your retailers? (Please circle YES or NO)

- | | YES | NO | | YES | NO |
|--------------------------------------|-----|----|--------------------------------|-----|----|
| a. advertising program | 1 | 2 | k. equipment procurement | 1 | 2 |
| b. educational/training program | 1 | 2 | l. gross margin report by item | 1 | 2 |
| c. retail accounting service | 1 | 2 | m. handle private label | 1 | 2 |
| d. member payroll | 1 | 2 | n. handle generic label | 1 | 2 |
| e. individual retail pricing program | 1 | 2 | o. discount programs | 1 | 2 |
| f. real estate & store engineering | 1 | 2 | p. space allocation | 1 | 2 |
| g. interior decor & design service | 1 | 2 | q. scanning support | 1 | 2 |
| h. product movement data | 1 | 2 | r. DSD system | 1 | 2 |
| i. equipment and fixture financing | 1 | 2 | s. OTHER | 1 | 2 |
| j. lease financing | 1 | 2 | (please specify) | | |

C. DRY GROCERY DISTRIBUTION CENTER/SECTION (EXCLUDING CIGARETTES)

6. Please complete a separate line for each of your dry grocery distribution centers/sections:

Dry Grocery Distribution Center/Section	Total Area in Sq. Ft. (1)	Type of Selection Method (Circle) (2)	Total No. of Employees in Distribution Center/Section (3)	Average No. of CASES Shipped Per Typical Week	Average No. of Supermarkets Served Per Center	Average No. of Shifts Per Week	Average No. of Items Available	Average No. of Inventory Turns	Current Scratch Rate (4)	Average No. of Inbound Truck Loads Per Week
#01		A B							_____ %	
#02		A B							_____ %	
#03		A B							_____ %	
#04		A B							_____ %	

D. FROZEN DISTRIBUTION CENTER/SECTION

7. Please complete a separate line for each of your frozen distribution centers/sections:

Frozen Distribution Center/Section	Commodity	Total Area in Sq. Ft. (1)	Primary Type of Selection Method (Circle) (5)	Total No. of Employees in Distribution Center/Section (3)	Average No. of CASES Shipped Per Typical Week	Average No. of Supermarkets Served Per Center	Average No. of Shifts Per WEEK	Average No. of Items Available	Average No. of Inventory Turns	Current Scratch Rate (4)	Average No. of Inbound Loads Per Week
#01			A B C							_____ %	
#02			A B C							_____ %	
#03			A B C							_____ %	
#04			A B C							_____ %	

Footnotes

- (1) Total area includes everything under roof such as receiving, storage and offices which are involved with dry grocery or frozen distribution center. Exclude manufacturing and packing.
- (2) Select one primary method per center, i.e., one with greatest volume. A - manual/conventional selection
B - select to conveyor
- (3) Please include all full-time and part-time distribution center employees, supervisors, loaders, maintenance, cleaners, clerical, etc., who work in the distribution center/section. If personnel work in more than one section, please estimate the employees by fraction of time spent in each section. This includes direct and indirect labor.
- (4) Scratch rate is the percentage of items ordered but not shipped to the store.
- (5) Select one primary method per center, i.e., one with greater volume.

A - from shelving
B - from flow rack
C - from carousel

Average No. of Inbound Railcars Per Week	Average No. of Outbound Vehicle Loads Per Week	Average No. of CASES Received per Direct Labor Hour	Average No. of PALLETS Stored and Replenished Per Direct Labor Hour (6)	Average No. of CASES Selected Per Direct Labor Hour (6)	Average No. of CASES Shipped Per Direct Labor Hour (6)	Average No. of Orders Processed Per Week (6)	Average No. of Days Center Operates Per Week	Unionized Employees (Circle)
								YES NO
								YES NO
								YES NO
								YES NO

Average No. of Inbound Railcars Per Week	Average No. of Outbound Vehicle Loads Per Week	Average No. of CASES Received Per Direct Labor Hour (6, 7)	Average No. of CASES Stored and Replenished Per Direct Labor Hour (6, 7)	Average No. of CASES Selected Per Direct Labor Hour (6, 7)	Average No. of CASES Shipped Per Direct Labor Hour (6, 7)	Average No. of Orders Processed Per Week	Average No. of Days Center Operates Per Week	Unionized Employees (Circle)	Center or Section (Circle)
								YES NO	C S
								YES NO	C S
								YES NO	C S
								YES NO	C S

Footnotes

- (6) Only include direct labor hours used to perform that specific task. Direct labor is labor used to physically move merchandise through the warehouse.
- (7) A ship pack is the store ordering unit.

D. TRAFFIC AND TRANSPORTATION

8. Please complete the following chart to describe your company's fleet in 1987. If data are not available by category, please just complete the total form:

		COLUMN A Owned by Your Company	COLUMN B Leased Equipment	COLUMN A & B TOTAL OPERATED BY YOUR COMPANY
a.	Total Number of Trailers Refrigerated			
b.	Dry			
c.	Total Number of Tractors 3 Axle			
d.	2 Axle			
e.	Total Number of Truck Fleet Miles in 1987			
f.	Total Dollar Amount Spent for Fuel (including tax)	\$	\$	\$
g.	Total Gallons Purchased			
h.	Average Fleet Miles Per Gallon	mpg	mpg	mpg

9. How many drivers are normally employed by your company? Company _____ Hired Service _____

a. Full time _____
b. Part time _____

10. What percentage of inbound truck loads is delivered by: (Please estimate if exact figures are unknown)

a. Supplier's private carrier %
b. Common carrier (supplier's and yours). %
c. Contract carrier (supplier's and yours) %
d. Independent trucker (supplier's and yours) %
e. Company trucks/backhaul. %
TOTAL 1 0 0. 0%

11. What is the AVERAGE NUMBER OF MILES per round trip per truck (include retail delivery and backhaul): _____ miles

12. What is the AVERAGE/LONGEST distance between your distribution center and the stores you serve by region? _____

	AVERAGE	LONGEST
a. Northeast	_____ miles	_____ miles
b. Middle Atlantic	_____ miles	_____ miles
c. East North Central	_____ miles	_____ miles
d. West North Central	_____ miles	_____ miles
e. Southeast	_____ miles	_____ miles
f. West South Central	_____ miles	_____ miles
g. Mountain	_____ miles	_____ miles
h. Pacific	_____ miles	_____ miles
i. Canada	_____ miles	_____ miles



FMI STORE LEVEL TRAINING QUESTIONNAIRE 1988

This questionnaire is part of FMI's annual industry study and is designed to provide descriptive and comparative information for this important segment of the food industry. Only with your participation and expertise can concise and representative data be developed. All information will be held in strictest confidence. This survey focuses on the training practices aimed at STORE PERSONNEL up to and including department manager. If you have any questions, please call the research department of FMI at (202) 429-8279.

1. For each position please place a check (✓) for the types of training methods used for store level personnel in 1987 (choose all that apply). Enter N/A if not applicable and / if no training is provided.

	Videos	Seminars	On-the-job	Certification Programs	Home Study	Other
Managers						
Clerks						
Cashiers						
Baggers						
Pharmacists*						

* Mark N/A if no pharmacists are in company

2. For each category, please indicate the NUMBER OF TRAINING HOURS required. Please answer all categories. Place a check (✓) if you do not provide training.

	NEW	EXPERIENCED	NO TRAINING
Managers			()
Clerks			()
Pharmacists			()
Cashiers			()
Baggers			()

3. Please check (✓) the topics that you offered managers and clerks. Put N/A for those topics that you do not offer:

	Manager	Clerk
Presentation of product		
Choice of product		
Operations and management		
Supervisory skills		
Inventory control		
Labor scheduling		
Care of product		
Selling skills		
Front end management		
Other merchandising		
Receiving/storage at back door		
Sanitation		
Safety		
Loss prevention		
Other		

4. What other training TOPICS will your personnel use in 1988?

5. Who actually conducts most of the training sessions? (Check only ONE)

- ☐ Company staff: Title of chief training person _____
☐ Wholesaler staff: Title _____
☐ National organizations _____
☐ Outside consultants _____
☐ Other (Please specify) _____

6. How many people on your company payroll actually conduct training: (Answer for both if applicable)

- ☐ On a FULL-TIME basis? _____ people _____ % of job time allocated for training
☐ On a PART-TIME basis? _____ people _____ % of job time allocated for training

7. For EACH position, indicate the ONE facility that is GENERALLY used to conduct the training:

- Manager: ☐ Company facility (i.e., training center)
CHOOSE ONLY ONE ☐ Store area away from selling area (i.e., break room)
☐ Non-company setting (i.e., hotel, commercial conference center)
☐ Other (Please specify) _____

- Clerk: ☐ Company facility (i.e., training center)
CHOOSE ONLY ONE ☐ Store area away from selling area (i.e., break room)
☐ Non-company setting (i.e., hotel, commercial conference center)
☐ Other (Please specify) _____

8. How much did your company spend on store level training in 1987? \$ _____

9. What new training METHODS would you like to use in 1988 (choose all that apply):

- ☐ Videos ☐ Seminars ☐ On-the-job training
☐ Certification programs ☐ Train the trainer ☐ Home study
☐ Other (Please specify) _____

FMI WHOLESALE TRAINING QUESTIONNAIRE 1988

This questionnaire is part of FMI's annual industry study and is designed to provide descriptive and comparative information for this important segment of the food industry. Only with your participation and expertise can concise and representative data be developed. All information will be held in strictest confidence. This survey focuses on the training practices aimed at store personnel up to and including department manager. If you have any questions, please call the research department of FMI at (202) 429-8279.

1. Do you provide training for your: Wholesale staff and retail customers ☐
 Retail customers only (Go to Section I) ☐
 Wholesale staff only (Go to Section II) ☐
 None (Please return survey to FMI) ☐

SECTION I: TRAINING FOR RETAIL CUSTOMERS

1. Do you have a REGULARLY scheduled series of educational programs? ☐ Yes: How often _____
☐ No
2. Have you used an educational check off (a way that automatically deducts a fixed amount of money to pay for educational programs)? Yes (Go to Question 3) ☐
 No (Go to Question 4) ☐
3. What is the payment method: . . . A fixed amount per week, month, quarterly, or annually ☐
 A percentage of sales per week, month or annually ☐
 Other (Please specify) _____
4. Do retail customers pay additional fees to attend educational programs? Yes ☐ No ☐
5. For each position please place a check (✓) for the types of training methods used in 1987.
 (Choose all that apply) Enter N/A if not applicable and / if no training is provided.

	Home Study	Videos	Seminars	On-the-job	Certification Programs	Train-the-Trainer
Managers						
Clerks						
Pharmacists						
Cashiers						
Baggers						

6. Indicate the TOPICS that you covered during the annual training cycle in 1987: (Choose all that apply)
- | | | |
|---|--|--|
| ☐ Choice of product | ☐ Care of product | ☐ Presentation of product |
| ☐ Selling | ☐ Front end management | ☐ Basic retail skills |
| ☐ Supervisory skills | ☐ Inventory | ☐ Receiving/storage |
| ☐ Scheduling | ☐ Store operations and management | |
7. Which types of training do you offer in addition to your regularly scheduled seminars?
 (Choose all that apply)
- ☐ Management conference/owner operator
- ☐ Food shows
- ☐ Other retailer retreats
- ☐ None
- ☐ Other (Please specify) _____

 If you offer training to your wholesale staff, please continue to Section II.

If you do NOT offer training to your wholesale staff go to Section III.

SECTION II: TRAINING FOR WHOLESALE STAFF

1. Please indicate the types of training methods you offered your staff. Put N/A if not applicable and ~~0~~ if no training is provided.

	Videos	Seminars	On-the-job	Certification Programs	Train-the-Trainer
Truck drivers					
Selectors					
Loaders					
Retail Counselors					

2. Does your training take place PRIMARILY at a: ☐/ Company facility (i.e., training center)
(CHOOSE ONLY ONE) ☐/ Non-company setting (i.e., hotel, commercial
conference center)
☐/ Other (Please specify) _____
3. What SUBJECTS will you offer your wholesale staff in 1988 that you did not offer in 1987?

4. What new teaching METHODS do you plan on using in 1988? ☐/ In-store classes ☐/ Videos
(CHOOSE ALL THAT APPLY) ☐/ Out-of-store classes ☐/ Consultants
☐/ Other (Please specify) _____

SECTION III: GENERAL INFORMATION

- [illegible]

FMI BUYER'S FUNCTION QUESTIONNAIRE 1988

This questionnaire is part of FMI's annual industry study and is designed to provide descriptive and comparative information for this important segment of the food industry during 1987. Only with your participation and expertise can concise and representative data be developed. All information will be held in strictest confidence. If you have any questions, please call the research department of FMI - (202)429-8279.

PLEASE PASS THIS SURVEY TO THE TOP BUYER.

I. GENERAL INFORMATION

1. How many full time buyers work in the company? _____ people
2. Approximately how many items are the responsibility of each buyer? _____ items
3. Please estimate the PERCENTAGE of time you spend:

a. Interviewing	1	
b. Pricing products	1	
c. Re-ordering	1	
d. Buying new items	1	
e. Category review	1	
f. Replenishing warehouse	1	
g. Merchandising	1	
h. Advertising	1	
i. Other (Please specify)	1	
	1	0 0%
4. For what REASONS do you meet with a sales representative: (Circle all that apply)

New item introduction	1	
Regular promotion campaign	2	
Special promotional campaigns	3	
Price changes	4	
Other: (Please specify) _____	5	
5. How is the buying function organized? (Circle one only). By the manufacturer . . . 1

		By product/category . . . 2
Other (Please specify) _____		3
6. Are you responsible for: (Circle only one) Only one department 1

		Many departments 2
(Please list) _____		

II. NEW ITEMS

7. Approximately how many new items did your company REVIEW during 1987 by category:

Grocery	items	
Produce	items	
Refrigerated/frozen	items	
GM/HaBA	items	
All others	items	
STORE TOTAL (add above figures)	items	
8. Approximately what percentage of the new items did the company decide to STOCK in your stores by category:

Grocery	%	
Produce	%	
Refrigerated/frozen	%	
GM/HaBA	%	
All others	%	
STORE TOTAL	1	0 0 0%

9. Do you place new products in a special area of a store? Yes . . . 1
 No. . . . 2
10. Do you use a buying committee to make decisions? (Circle one only). Yes (Go to question 11) . . . 1
 No (Go to question 13). . . . 2
11. Which people are members of the buying committee (Circle all that apply): Buying executive 1
 Merchandiser 2
 Corporate executive. 3
 Store management 4
 Distribution executive 5
 Operations executive 6
 Other (Please specify) _____ 7
12. How often does the buying committee meet? Daily 1
 Weekly. . . . 2
 Monthly 3
 Other (Specify) _____ 4
13. Which ONE statement best describes how the final buying decision is made?: (Circle one only)
 The buying committee votes 1
 We try to reach a consensus 2
 One or two people on the committee make the final decision. . . 3
 I make all the final decisions. 4
14. In your opinion, which area has experienced the most NEW item introductions? (Circle one only)
 Grocery 1
 Produce 2
 GM/HiBA 3
 Refrigerated/Frozen 4
 Other (Please specify) _____ 5
15. What type of information does your company regularly produce about items? (Circle all that apply)
 Item movement in the warehouse 1
 Item movement in the store 2
 DPP 3
 Dollar contribution 4
 Gross margin. 5
 Service levels of warehouse to stores . . 6
 Dead product report 7
 Other (Please specify) _____ 8
16. Which information sources do you use to make new item decisions? (Circle all that apply)
 Sales. 1
 Warehouse turns. 2
 Customer suggestions 3
 Store personnel. 4
 Vendor information 5
 Trade press. 6
 Market research studies for your company 7
 Firms that track product movement. . . . 8
 Other (Please specify) _____ 9

17. How often do you evaluate your product mix? (Circle only one)
- | | |
|------------------------------|---|
| Weekly | 1 |
| Monthly | 2 |
| Twice a year | 3 |
| Three times a year | 4 |
| Based on new item activity | 5 |
| Other (Please specify) _____ | 6 |
-
18. What "rules of thumb" do you use in deciding to keep a product? (Circle all that apply)
- | | |
|-------------------------------|---|
| Turns/Time period | 1 |
| Customer comments | 2 |
| Store personnel comments | 3 |
| Gross margin | 4 |
| Product mix | 5 |
| Dollar contribution | 6 |
| DPP | 7 |
| Other (Please specify): _____ | 8 |
19. Do you use the scanning information to help you decide which items to keep or delete? (Circle one only)
- | | |
|-------------------------|---|
| Yes (Go to question 20) | 1 |
| No (Go to question 21) | 2 |
20. How do you use the scanning information? _____
21. Is your company involved with DPP? (Circle one)
- | | |
|-------------------------|---|
| Yes (Go to question 22) | 1 |
| No (Go to question 25) | 2 |
22. Do you use DPP (Direct Product Profit) in your buying decision?
- | | |
|-------------------------|---|
| Yes (Go to question 23) | 1 |
| No (Go to question 25) | 2 |
23. How do you use DPP? _____
24. In which ways do you use DPP information in making your buying decisions?
- | | |
|------------------------------|---|
| Product mix of all items | 1 |
| Shelf space planning | 2 |
| Compare new products | 3 |
| Other (Please specify) _____ | 4 |
25. Are you responsible for planograms? (Circle one)
- | | |
|-------------------------|---|
| Yes (Go to question 26) | 1 |
| No (Go to question 27) | 2 |
26. What criteria do you use to alter the shelf layout? _____

III. PACK SIZE

27. Have you REJECTED a product due to the pack size available? (Circle one)
- | | |
|-------------------------|---|
| Yes (Go to question 28) | 1 |
| No (Go to question 29) | 2 |
28. Identify the reason(s) you rejected a product due to the size of the pack:
- | | |
|--------------------------------------|---|
| Pack too large for shelf | 1 |
| Pack too small for shelf | 2 |
| Broad size of case too large | 3 |
| Wrong size pack for time of year | 4 |
| Wrong size pack for slow moving item | 5 |
| Wrong size pack for fast moving item | 6 |

29. Did you request DIFFERENT pack sizes from the manufacturer in 1987? Please circle YES or NO and circle the different pack size you requested.

DIFFERENT PACK SIZE		
1 Yes - for fast moving products	Larger	Smaller
2 Yes - for slow moving products	Larger	Smaller
3 No (Go to question 31)		

30. Did the manufacturer comply with your request for a different pack size? Yes. . . 1
 No . . . 2
31. Choose the ONE statement that best describes you: I typically buy pack sizes that are 6-12-24. 1
 I have ordered unusual pack sizes that are 10-14-20. . . 2
32. How do you determine the pack size to order? (Circle all that apply)
 Use DPP. 1
 Use planograms specifically designed for our company/store 2
 Lay out a "test" shelf based on planogram. 3
 Work with manufacturer 4
33. Which services do you EXPECT from a manufacturer? (Circle all that apply)
 Store level. 1
 Qualified headquarters personnel 2
 Spoils program 3
 Broker 4
 Retail assistance (i.e., rotation schematic resets). . . . 5
34. Overall, how would you rate your company's relations with manufacturers? (Circle one only)
 Excellent. 1
 Above average. 2
 Average. 3
 Below average. 4
 Poor 5
35. Which services does the wholesaler provide in making buying decisions? (Circle all that apply)
 Ad support. 1
 Private label 2
 Quality assurance 3
 Other (Please specify) _____ 4

FMI ENERGY MANAGEMENT QUESTIONNAIRE 1988

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I. GENERAL INFORMATION

1. Are you PRIMARILY a: Retailer 1
 Wholesaler 2

II. HVAC

2. How many stores have the following HVAC equipment? Roof top units stores
 Split systems stores
 Dessicant dehumidifiers stores
 Humid climate or low dewpoint AC system stores
 Other stores

3. What percentage of your stores have heat reclaim heating? %

4. Which of the following steps have you undertaken to control HEATING costs (Circle all that apply):

NEW RETRO

- 1 2 Installed heat reclamation systems tied in with refrigeration compressors
 1 2 Reduced store front or other windows
 1 2 Lowered temperatures in the store at certain times of day
 1 2 Changed heating systems
 1 2 Improved efficiency of your boiler or auxiliary heat source
 1 -2 Reduced infiltration losses
 1 Other (please specify) _____
 1 None of the above

5. Which steps have you undertaken to control AIR CONDITIONING costs (Circle all that apply):

NEW RETRO

- 1 2 Shut off cooling systems at certain times of the day
 1 2 Raised temperatures
 1 2 Moderated outside air intake
 1 2 Other (please specify) _____

6. Which steps have you undertaken to increase INSULATION (Circle all that apply)?

NEW RETRO

- 1 2 Added insulation to the roof
 1 2 Added insulation above the ceiling
 1 2 Added insulation into the walls
 1 2 Added insulation over the basement
 1 2 Added insulation under freezer boxes
 1 2 Other (please specify) _____

7. What percentage of stores have night setback temperature controls? %

8. What percentage of stores have two-speed or variable speed air handlers? %

III. ENERGY STATISTICS

9. What was your total ENERGY bill for 1987? \$ _____

10. What was the average KWH/Sq. Ft. per store? KWH/Sq. Ft.

11. What was the average Cost/KWH for your stores? Cost/KWH

IV. ENERGY CONTROLLERS

12. Which electronic energy controllers do you install as standard equipment on new stores. (Circle all that apply)
- | | |
|---------------------------------|--|
| 1 Defrost timer | 6 Pressure control (may include temperature) |
| 2 HVAC control | 7 Refrigeration temperature control (excluding pressure) |
| 3 Lighting control (time clock) | 8 Condenser temperature/pressure controller |
| 4 Demand limiter or load cyclor | 9 Medium integrated controller (combines 2 or 3 of the above functions) |
| 5 Refrigeration alarm system | 10 Large integrated controller (combines 4 or more of the above functions) |
| | 11 Other (Please specify) _____ |
13. Please estimate how much money you saved by the use of this system: \$ _____ per year
14. How much do you spend per store to maintain these systems?. \$ _____ per store
15. How much do you save in lost product due to early detection (per store)?. \$ _____ per store
16. What method do you use to evaluate savings? (Circle all that apply)
- | | |
|-------------------------------------|---|
| Compare with other stores | 1 |
| Project figures | 2 |
| On-Off testing. | 3 |
17. How long was the payback period for the entire system? _____ months \$ _____ per year

V. REFRIGERATION

18. What percentage of your stores use these REFRIGERATION systems?
- | | |
|------------------------------|---------|
| Single conventional units | _____ % |
| Even parallels | _____ % |
| Uneven parallels | _____ % |
| Other (Please specify) _____ | |
19. What percentage of your stores use these CONDENSING systems?
- | | |
|------------------------------|---------|
| Air cooled | _____ % |
| Water cooled | _____ % |
| Other (Please specify) _____ | |
20. Which systems do you install for NEW stores (Circle all that apply)?
- | | |
|----------------------------|--|
| 1 Open drive | 7 Variable speed compressors |
| 2 Even parallels | 8 Large energy management system |
| 3 Thermostat | 9 Mechanical pressure control |
| 4 With unloaders | 10 Electronic temperature control |
| 5 Uneven parallels | 11 Small electronic pressure control (may include temperature) |
| 6 Single conventional unit | 12 Other (Please specify) _____ |

VI. LIGHTING

21. What percentage of stores have the following main lighting system?
- | | |
|------------------------------------|---------|
| Fluorescent. | _____ % |
| High intensity discharge | _____ % |
| Other _____ | _____ % |
22. What percentage of stores have the following controls:
- | | |
|--|---------|
| Mechanical/electrical time clocks. | _____ % |
| Electronic time control. | _____ % |
| Other (specify) _____ | _____ % |
23. Which of the following steps have you done to control LIGHTING (choose all that apply)
- | NEW | RETRO | |
|-----|-------|-------------------------------|
| 1 | 2 | Switched to low energy bulbs |
| 1 | 2 | Electronic ballasts |
| 1 | 2 | Removed unnecessary lamps |
| 1 | 2 | Specular silver reflectors |
| 1 | 2 | Lowered light levels |
| 1 | 2 | Ballast enhancement devices |
| 1 | | None of the above |
| 1 | | Other (Please specify): _____ |



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